Interim System
Release 1.0

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Training Materials

U.S. Department of the Interior • Bureau of Land Management • Service Center

A

A. Overview Training Guide

Instructor's Version
Includes Teaching Notes

The purpose of this course is...

- To provide participants with introductory information about the BLM's Interim System. This course includes a review of:

  - Why the BLM is implementing the Interim System at this time.
  - What a Relational Database Management System (RDBMS) is in the context of the Interim System.
  - What types of information are available in the Interim System, both on-line and in off-line reports.
  - What kinds of data manipulations the Interim System can perform.
  - What must be done to gain access to the Interim System (and who manages and approves this access).
  - What types of Interim System documentation and training are available.
  - How to obtain more information concerning the Interim System.

1. The Interim System Overview Course

1.1 Participants

5 Minutes
(Instructor Introductions, Purpose on p.1, Participants, Prerequisites and Questions)

Emphasize who should and should not be in this class.

The Interim System Overview course is the principal introductory presentation attended by members of the public as well as BLM management personnel. Members of the public and BLM managers should participate in this course if they are interested in:

- understanding the basic capabilities of the Interim System and what information is available that might benefit their work activities and the work activities of those they manage.
- accessing and using the Interim System to obtain information from the BLM's automated land and mineral recordation database.
- learning about what Interim System documentation and training is available.

Individuals participating in this training course should fit clearly into at least one of the following personnel categories:

Public Awareness
This category includes management personnel from other Federal, State, Local and private organizations who interact with BLM on a continual basis. These users' interest focuses on basic System capabilities and available information, in both on-line and off-line formats, that benefits their work activities.

Basic Retrieval, System Familiarization (Public)
This category consists of the public users — individuals who call or visit public rooms, private sector businesses with modem hook-ups, and other Federal, State or Local agencies. These people use the Interim System only for retrieval purposes.

BLM Management Staff
This category consists of BLM management personnel and user representatives. These individuals use the Interim System to perform management-related tasks: monitor QA/QC procedures, generate management reports, and monitor personnel and system performance.

1.2 Course Prerequisites

This class has no prerequisites.

There are no prerequisites for participating in the *Interim System Overview* course. It is expected that while some participants are quite familiar with the BLM's current automated systems (including AALRS, Mining Claims, Case Recordation and ORCA) and their automated databases, others may be completely new to the concepts of automated land and mineral recordation systems, automated data retrieval, and relational databases.

10 Minutes
(Ice Breaker, Housekeeping Rules and Attendance)

For an Ice Breaker, have students fill out name tags/place cards and introduce themselves.

Review the Housekeeping Rules for the classroom.

Pass the Attendance Sign-In Sheet around the class.

2. Purpose of Overview Course

10 Minutes
(Purpose of this Course (re-state), Course Objectives and Course Schedule)

Restate the Purpose of the Overview Course.

To provide participants with introductory information the BLM's Interim System. This information includes reviews of:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System, both on-line and in off-line reports.
- The kinds of data manipulations the Interim System can perform.
- What must be done to gain access to the Interim System (and who manages and approves this access).
- What types of Interim System documentation and training are available.
- How to obtain more information concerning the Interim System.

3. Overview Course Objectives

Write Objectives on a flip chart as each is reviewed.

Given a presentation of introductory Interim System information, participants will be able to briefly discuss the following in their own words:

- Why the Bureau of Land Management is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What types of data manipulations the Interim System can perform.
- What information is available on-line, and what off-line reports are available in the Interim System.
- What must be done to gain access to the system.
- What documentation and training are available, and how to obtain additional information concerning the Interim System.

Review Class Schedule.

Prompt for and answer questions.

4. Interim System Overview Information

15 Minutes
(The Interim System in Brief, Interim's place Within the BLM Modernization Effort, Why Current Systems Are Being Replaced, the Core System and state's Sub-Systems, Other Advantages of Interim, and Questions)

Explain what Interim System Release 1.0 is, and what Release 2.0 will be.

The Interim System (In Brief)

The Interim System is the Bureau of Land Management's newest land and mineral record system. It is replacing several older land and mineral record systems used by various BLM offices. Interim System Release 1.0 will replace the land and mineral record system currently used by the Alaska BLM. Interim System Release 2.0 will replace the record systems currently used by BLM offices in the lower-48 states, as well as Release 1.0 software.

Briefly mention the LIS concept, ALMRS as its land and mineral record keeping component, and the Interim System as an intermediate step to the future ALMRS.

The Interim System's Place Within the BLM Modernization Effort

The Interim System is a step in the BLM's long-term modernization effort to automate existing manual systems and to improve current automated systems. Within the overall modernization effort, the BLM is working toward the concept of an integrated Land Information System (LIS), the goal of which is to organize and tie public land and resource information to the specific parcels of land created by the Public Land Survey System and managed by the BLM. The Automated Land and Mineral Record System (ALMRS) project addresses the land and mineral record keeping portion of the BLM's LIS concept. The Interim System is an intermediate step on the way to the ALMRS of the future.

The Interim System is named specifically to emphasize the time frame during which it will be used — the time between now and the future purchase, development and installation of new hardware and software (often referred to as the Target System) for the ALMRS/Modernization Project.

Discuss the record systems that the Interim System is replacing.

The Interim System is intended to serve as an intermediate stage between several different land and mineral record systems currently used by the BLM and the Automated Land and Mineral Record System (ALMRS). When fully implemented, the Interim System will replace the following systems now in use: Case Recordation (C/R), On-line Retrieval Case Access (ORCA), Mining Claims Recordation (MCR) and the Alaska Automated Land Records System (AALRS).

Why Current Land and Mineral Record Systems Are Being Replaced

Review the two primary reasons for moving to the Interim System (as well as the advantages): Database Modernization & Data Standardization for the BLM.

There are two primary reasons for moving the BLM's public land and mineral record keeping process onto the Interim System. The first reason is to modernize the type of database used to store land and mineral records. Most land and mineral record systems currently used in the BLM employ network model databases that are outdated. The Interim System uses a current, industry-standard relational database management system, Oracle®, to store and manage land and mineral information. There are significant technical advantages that a relational database model has over network models (these will be discussed later), and the switch to the Interim System allows the BLM to take advantage of them.

The second reason to replace current systems with the Interim System is standardization: standardization of data, standardization of the database used to store and maintain public land and mineral information, standardization of the system used to enter, maintain and retrieve data, and standardization of the computer hardware on which the system runs. The BLM currently stores public land and mineral information in many places and in many different formats, and the sharing of data among systems and people is constrained by the number of different systems and the appearance of their information. Current BLM modernization efforts are looking to a future in which land and mineral records (as well and cadastral survey and resource information) are available to BLM, government and public users nation-wide in a common form that can be stored, maintained and shared. This open flow of information is a vision for the future, but the Interim System represents a significant first step toward standardizing land and mineral record data throughout the BLM and the system with which users access that information. Interim is designed to pave the way for the Target System and make the transition to this future system less difficult.

Mention that Interim uses the Master Name concept.

In addition to replacing the different land and mineral recordation systems currently used by the BLM, the Interim System also makes use of the Master Name concept that will allow the BLM to use a national name database with a standard customer ID number process.

The Interim System Core and Sub-Systems

Describe the concepts of the Core System and each state's Sub-Systems.

The Interim System, as implemented in each BLM state, will actually consist of two parts. The first part can be referred to as the Core System. This portion of the Interim System has been developed at the Service Center and contains the land and mineral record system functions common to all states. When fully implemented, the Core of the Interim System will be the BLM's standard automated land and mineral record system.

The BLM recognizes that each state has unique land and mineral record automation needs not addressed by the Bureau-wide Core System. To meet these needs, each BLM state can develop its own unique additions to the Core System. These unique, state-specific functions make up the second part of a state's Interim System: its Interim Sub-Systems. Since each state can develop individually tailored additions to the Core System that it feels are necessary for its day-to-day operations, its Sub-Systems are likely to be incompatible to some degree with other state's Sub-Systems.

Prompt for and answer questions.

Release 1.0 of the Interim System: A More Detailed Look

20 Minutes
(Release 1.0 in detail)

Discuss the replacement of AALRS on the Burroughs computer with Interim System Release 1.0 on a Prime computer.

Release 1.0 of the Interim System is a software package designed to replace those portions of the Alaska Automated Land Records System (AALRS) that are similar in function to the land and mineral records systems used by BLM offices in the lower-48 states. It is the Alaska BLM's Core Interim System.

The outdated Burroughs computer system that hosted AALRS has been replaced by a newer Prime computer hosting the Interim System. The land and mineral record needs of the Alaska BLM had outgrown the overloaded (and expensive to maintain) Burroughs; the new Prime alleviates these data storage difficulties and costs less to maintain.

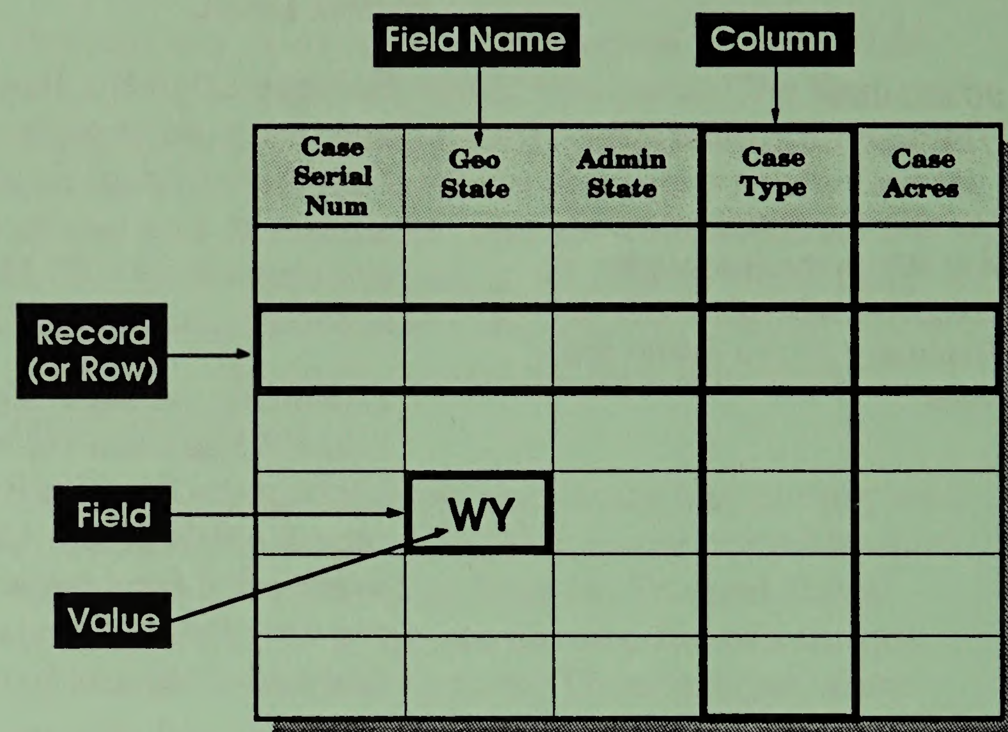
Review how the Interim System uses an industry-standard relational database structure, and why it is replacing older network database models used by the BLM.

Like AALRS, Interim is an automated land and mineral recordation system that allows you to store, maintain and retrieve case record information. Unlike AALRS, however, the Interim System uses the newer *relational* database structure that is becoming standard throughout private industry and government.

Current BLM systems use an older *network* database model that stores some information as values and other information as pointers. Only information stored as pointers can be used to link the values in one record to those in another. Unfortunately, the decision to store information as a pointer or as a value must be made when the database is established. To change the basic structure of a network database requires significant reworking of the computer code that operates the system.

A relational database, such as that used by the Interim System, organizes data into tables of related information.

Briefly describe how a relational database organizes and stores information.
Refer to the table diagram.



Tables consist of vertical columns and rows. A column identifies a single data element and is given a name (e.g., Action Code). Rows cut across columns and are made up of fields that may contain values. A series of fields make up a record which corresponds to a row in a table. In a relational database, any two or more tables can be related to one another by including a common column between them. By relating tables in this way, it is relatively simple to tie the information from many different tables together.

Briefly review some advantages of relational databases.

Unlike a network database, you can easily modify or add to the basic structure of a relational database. New tables with columns common to other existing table columns can be added and thus related to other information quickly. It is also a simple process to add new columns to existing tables and to establish new relationships among the data, as well as to modify existing columns. As the needs and demands placed on a relational database change and grow, the very organization of and interrelationships within the database can be modified to accommodate them. As the needs of the BLM change over the years, the Interim System can be expanded and altered significantly to accommodate these changes without having to start all over again with yet another new recordation system.

Discuss how BLM data standardization efforts are reflected in the Interim System, and how some data elements have been added, deleted and changed.

As discussed earlier, the switch from existing systems to the Interim System is also helping the BLM to take significant steps forward in an on-going effort to standardize automated data. In using the Interim System, you will begin to see some of the results of this standardization in many of the data elements used to record case information. As part of your training for the new system, you will receive explanations of how any data element changes might affect your work.

Review the results of switching from AALRS to Interim System Release 1.0 for the Alaska BLM. Write these results on a flip chart during the review.

In summary, the transition from the Alaska Automated Land Records System (AALRS) to the Interim System results in the following:

- Moves the Alaska BLM recordation system off of the old, overloaded Burroughs computer onto the newer Prime computer system.
- Replaces an older network database model with an industry-standard relational database.
- Gives the BLM a significant start in the process of standardizing automated data.

Prompt for and answer questions.

Facilitate a group discussion: The ramifications of switching from AALRS to the Interim System.

Capabilities of the Interim System

20 Minutes

Discuss how the Interim System can handle the work performed by AALRS, and how its on-line retrieval and validation capabilities are significant enhancements for the BLM.

Discuss the Interim System's Core structure, and the overall purpose of each section in the System.
Refer to the System Map.

Prompt for and answer questions concerning each section of the System as it is reviewed.

The Interim System is a complete land and mineral record system capable of all the data input, update and retrieval functions (including the generation of off-line reports) of the systems it is replacing. In fact, the Interim System significantly enhances the power and flexibility of on-line data retrieval, and makes considerable progress towards monitoring and verifying data for error as it is input or updated. The Interim System's Core is subdivided into several main groups of functions or programs:

- **Case Processing** — This portion of the System is restricted to those users responsible for data entry and update. Programs in this section allow users to update any information in existing cases and to lock and unlock case land and action records in cases.

- **Report Processing** — This portion of the System allows authorized users to request and print off-line reports. Users chose selection criteria that specify the data to be retrieved and printed in reports, as well as the sort order of printed data. Interim System off-line reports contain information equivalent to data available in off-line reports in older BLM land and mineral record systems. Off-line report categories include: case abstracts, land reports (including area analysis and case land summary and detail reports), serial number list reports, case synopsis reports, action code usage/summary reports, case type summary reports and mining claim reports.

- **Data Retrieval Functions** — This portion of the System is accessible to all users, and contains programs that retrieve and display stored data on-line. This section also provides users with powerful programs that allow them to find case and customer data using customer names, mining claim names, geographic names and document numbers. All of the information stored for a case can be retrieved on-line, and Case Abstracts can be printed off-line, if desired.

- **Restricted Case Processing** — This portion of the System is restricted to high-level users responsible for case processing functions that can effect large numbers of cases and/or permanently alter vital case data. Programs in this section allow users to gener-

ate case serial numbers, establish one or more cases, update multiple cases simultaneously, and void cases.

- **Customer Processing** — This portion of the System is restricted to users who work directly with the customer tables in the System database. Programs in this section allow users to add customers to (and delete customers from) the System, update customer information, query archived customer data and print off-line customer table reports.
- **Legal Land Description Processing** — This portion of the System is restricted to users who work directly with the legal land description table in the System database. Programs in this section allow users to add, change and delete LLD records in the System and print off-line LLD table reports.
- **Accounting Advice Processing** — This portion of the System is restricted to users who work directly with the accounting advice portion of the Interim System database. Programs in this section allow users to generate accounting advice receipts (both case-related and non-case related), void receipts, print historical receipts, and print off-line accounting advice reports.

Interim System Security and Data Integrity

5 Minutes
(Interim System Security and Data Integrity, and Gaining Access to the System)

Briefly discuss System security as it relates to database functions available in each section of the System.

Emphasize that the greater an individual's privileges are on the System, the greater their responsibilities are for the integrity of data.

While all users have access to Data Retrieval Functions programs, access to all other portions of the Core System is strictly controlled. Each Interim System user is assigned to one of several System security levels established by the Database Administrator (DBA) in your state. A user's specific security level determines their access to and privileges on the System. Security levels are based on Prime user ID's and/ or Oracle® user ID's. It should be stressed that greater privileges on the System bring with them greater responsibility for insuring data integrity and system security.

Security levels range from those granted to the public (allowing the retrieval of land and mineral case information), to those held by the Database Administrator. Most BLM users have System privileges that allow them to retrieve case information on-line from the database and to request off-line reports. Specifically selected BLM users also have privileges to enter, modify and delete case data. Still others have privileges to maintain customer information, legal land description information or accounting advice data in the database.

Other than understanding that the Interim System has different levels of security that control access to its various parts, you need not be concerned with security or system privileges. In using the Interim System, users normally do not see any indication of what privileges they have - nor will they need to. The System automatically assigns security levels, controls each user's options for working within the software, and frees users to concentrate on their land and mineral data tasks.

Mention that the Interim System's security is separate and different form the Prime computer system's security.

Prompt for and answer questions before moving on to discuss gaining access to the System.

NOTE:
Interim System security levels should not be confused with Prime computer security levels. The Prime's security system is separate from Interim System security. For questions regarding Prime security, see your state's Prime computer System Manager. For questions regarding Interim System security, see your state's Database Administrator.

Gaining Access to the Interim System

Briefly discuss how to gain access to the Interim System.

To obtain an account on the Prime computer and an Interim System Oracle® user ID/password, contact: (or the equivalent office in your state)

Branch of Computer Operations
Division of Information Resource Management
BLM Alaska State Office
222 West 7th Ave., #13
Anchorage, Alaska 99513-7599
(907) 271-5057

Documentation Available for the Interim System

20 Minutes

Discuss each element in the Interim System Documentation Library.
Refer to and display each element of the Library as it is reviewed.

Prompt for and answer questions concerning each element of System Documentation before moving on to discuss the next element.

Specific documentation products have been created for the Core Interim System, and are all part of the Interim System Documentation Library. The Documentation Library contains several major elements, or books, that each provide a unique set of information to the user. These elements are:

Introductory Materials — The Introductory Materials provide the user with information that applies to the entire documentation library.

Chapter 1 discusses the overall objectives and purposes of the Interim System and why it is replacing the older automated land record systems in the Bureau of Land Management.

Chapter 2 explains the organization and usage of the documentation, the graphic and typographic conventions used throughout the documentation library, and defines some common terms used throughout the documentation.

Chapter 3 explains how to get started using the Interim System, including: System login procedures, terminal type configuration, List of Values (LOV) usage, Quick Transfer (QXFER) usage, and other pertinent System functions.

User's Handbook — The User's Handbook contains usage and function information on each Menu, Form, Page and Field in the System. It follows the design and organization of the System's menu structure. Each chapter in the User's Handbook corresponds to a menu item on the System's Main Menu that appears when you enter the System. Each subsequent section in the chapters matches the organizational structure, and is numbered accordingly, for all of the elements depicted on the Interim System Map.

Reference Guide — The Reference Guide contains information on each piece of the System organized alphabetically by menu, form or field.

Chapter 1 contains an alphabetical listing of each menu in the System followed by a brief explanation of the menu's purpose and the available options.

Chapter 2 contains a listing and description of each form found in the System, including purpose, use, structure and content overview. The forms are listed in order of their Program Name, such as CASE125F, rather than alphabetically by name.

Chapter 3 contains an alphabetical listing of each field found within the System. The alphabetical listing follows the BLM standard Data Element Dictionary abbreviations of the standard abbreviation of the field as it is used throughout the System. Each field's listing contains a description of its use and, if applicable, its Data Element number.

Glossary of Terms — The Glossary contains an alphabetical listing and definitions of useful System and case recordation terms used in documentation.

Appendices — The Appendices contain various supplemental information to assist users.

Appendix A contains the keyboard mapping for the various terminals supported by the System.

Appendix B contains a listing of the error messages in the System with troubleshooting descriptions.

Appendix C contains a complete core System Map.

Appendix D contains data matrix information that crosswalks older data element numbers with newer, revised codes.

Index — The Index contains an alphabetical listing of subjects contained throughout the System Documentation Library. Each subject entry in the index identifies the documentation element in which the reference can be found and then the page number within that particular documentation element.

Keyboard Templates —The physical Keyboard Templates for each of the various terminals supported by the System.

Quick Reference Guide —The Quick Reference Guide is a one-page sheet that briefly outlines System content, structure and functionality.

Training Guides — There are eight Training Guides, one for each of eight courses developed to address various sections of the Core System. (See following)

Training Available for the Interim System

20 Minutes

Review the content and intended audience of each Interim System training course.
Refer to and display the appropriate Training Guide when discussing each course.

Prompt for and answer questions concerning each course before moving on to discuss the next training course.

Specific training products and courses have been created for the Core Interim System, including student and instructor training guides, course outlines and visual aids. Seven sequential courses have been developed that address the various portions of the Core System.

Overview course — The Overview course is the principal introductory presentation for members of the public as well as BLM management personnel. The presentation you are participating in right now is the Overview course.

Data Retrieval (BLM) and ***Data Retrieval (Public)*** courses — The Data Retrieval courses are the principal courses that teach the fundamentals necessary to access and use the Prime computer and Interim System software. In addition to introductory information concerning critical concepts, terms and access procedures, the Data Retrieval courses cover those portions of the System specifically designed for on-line data retrieval and the generation of off-line reports. Anyone who accesses and uses the Interim System in any way and for any purpose should participate in a Data Retrieval course.

Case Processing course — The Case Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update and deletion of automated land and mineral case data, including case header, case-customer, case land, action, general remarks, units/commodity, U.S. rights, geographic name and parcel occupancy data. All BLM employees responsible for either case processing tasks or the support/supervision of such tasks should participate in this course.

Customer Processing course — The Customer Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update, deletion and query of customer information in the Interim System database. Only BLM employees responsible for either customer processing tasks or the support/supervision of such tasks should participate in this course.

Legal Land Description Processing course — The Legal Land Description Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update, and deletion of legal land description information in the Interim System database. Only BLM employees responsible for either legal land description processing tasks or the support/supervision of such tasks should participate in this course.

Accounting Advice Processing course — The Accounting Advice Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entering, printing and voiding of accounting advice information in the Interim System database. Only BLM employees responsible for either accounting advice processing tasks or the support/supervision of such tasks should participate in this course.

Restricted Case Processing course — The Restricted Case Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for higher-level database functions associated with automated land and mineral case recordation data. Due to their widespread privileges within the System, users of restricted case processing take on a large responsibility for maintaining the integrity of the System. This course is required for BLM employees responsible for either restricted case processing tasks or the support/supervision of such tasks.

How to Obtain More Information Concerning the Interim System

5 Minutes

Review how course participants can obtain more information concerning the Interim System (contact personnel, addresses and phone numbers).

There are two primary sources of Interim System information for topics not covered in the Interim System Documentation Library: your BLM State Office and the Field Operations Section of the BLM Service Center.

In your BLM State Office, more information can be obtained from: (or the equivalent in your state)

LIS Project Coordinator
Division of Information Resource Management
BLM Alaska State Office
222 West 7th Ave., #13
Anchorage, Alaska 99513-7599
Phone: (907) 271-5057
FAX: (907) 271-4595

The Service Center's Interim Staff can be reached at the following address and telephone numbers:

Chief, GIS Support Section
Bureau of Land Management (SC-344C)
Service Center
Building 50, Denver Federal Center
Post Office Box 25047
Lakewood, Colorado 80225-0047
Phone: (303) 236-0987
FAX: (303) 236-0831

15 Minutes
(Course Review and Facilitated Group Discussion, Questions, Close-Out and Evaluations)

Briefly review material covered in the Overview Course, and facilitate a group discussion concerning the Interim System. Prompt for and answer questions.

Close-out with the class, and have each participant fill out an Instructor Evaluation Form.

B

B. Interim System Data Retrieval (BLM) Training Guide

Instructor's Version
Includes Teaching Notes

The purpose of this course is...

- To teach participants to retrieve on-line case, customer, action and land information from the Interim System using Interim System forms. These forms include:

  - TWPALL/Township Summary
  - Township Status Display
  - On-line Case Abstract
  - FIND-Customer, FIND-Document, FIND-Claim Name, and FIND-Geographic Name
  - Valid Action Code, Valid Case Type, and Valid Case Type/Action Code

- To teach participants to request off-line reports available in the Interim System using Interim System forms.

1. Interim System Data Retrieval (BLM) Course

1.1 Participants

10 Minutes
(Instructor Introductions, Purpose on p.1, Participants, Prerequisites and Questions)

The Interim System Data Retrieval (BLM) course is the principal course that teaches BLM employees the fundamentals necessary to access and use the Prime computer and Interim System software. In addition to introductory information concerning critical concepts, terms and access procedures, the Interim System Data Retrieval (BLM) course covers those portions of the Interim System specifically designed for on-line data retrieval and the generation of off-line reports. All BLM employees who access and use the Interim System in any way and for any purpose should participate in this course.

Emphasize that the information presented in this course is essential for anyone who wishes to access and use the Interim System for any purpose.

Individuals participating in this training course should fit into at least one of the following groups:

Basic Retrieval, System Familiarization (BLM)
This category of BLM employees use the Interim System only for retrieval purposes. These users generally retrieve on-line data solely for informational tasks. A select number of individuals in this category rely on the reference information in off-line reports available from the System. These users select parameters for basic pre-constructed on-line screen dumps and off-line reports.

Case Processing Personnel
Individuals in this category perform the following functions in the Interim System database:

- Add, change and delete serialized case information interactively.
- Lock and unlock action or land records interactively.

Ad-Hoc Data Query Personnel
This category of users develops ad-hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Restricted Case Processing Functions Personnel

This category consists of individuals who assign case serial numbers, establish one or more cases, add/update actions and general remarks in random or multiple cases, and void cases.

Customer Processing Personnel

Individuals in this category maintain the integrity of the Interim System customer database. These individuals add, delete and update customer information on a regular basis.

Legal Land Description Processing Personnel

This category of individuals maintains the integrity of the Interim System Legal Land Description (LLD) database. These individuals add, delete and update LLD information.

System Application Support & Maintenance Personnel

Individuals in this category maintain the operational status of the Prime computers and the Interim System software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

This class has no prerequisites.

There are no prerequisites for participating in the *Interim System Data Retrieval (BLM)* course. It is expected that while some participants are quite familiar with the BLM's current automated systems (including AALRS, Mining Claims, Case Recordation, and ORCA) and their automated databases, others may be completely new to the concepts of automated land and mineral recordation systems, automated data retrieval, and relational databases.

Prompt for and answer questions.

10 Minutes
(Ice Breaker, Housekeeping Rules and Attendance)

For an Ice Breaker, have students fill out name tags/place cards and introduce themselves.

Review the Housekeeping Rules for the classroom.

Pass the Attendance Sign-In Sheet around the class.

2. Purpose of Interim System Data Retrieval (BLM) Course

15 Minutes
(Purpose of this Course (restate), What is Data Retrieval?, AALRS Tasks Covered in this Course, Course Objectives and Course Schedule)

Restate the Purpose of the Data Retrieval (BLM) Course.

To teach participants to retrieve on-line case, customer, action and land information from the Interim System using Interim System forms. These forms include: TWPALL/Township Summary, Township Status Display, On-line Case Abstract, FIND - Customer, FIND - Document, FIND - Claim Name, FIND - Geographic Name, Valid Action Code, Valid Case Type, and Valid Case Type/Action Code.

Additionally, the purpose is to teach participants to request off-line reports available in the Interim System using Interim System forms. These reports include: Case Abstract, Action Code, Case Type, Customer ID List, Land, Mining Claims, Mineral Management Service (MMS) and Case Serial Number Reports.

2.1 What is Data Retrieval?

Explain what data retrieval is in general, and briefly review the tasks that can be performed using each form in the Data Retrieval section of the System.

Refer to the System Map when reviewing data retrieval tasks and forms.

This course uses the term data retrieval to address the set of automated tasks that access and retrieve land and mineral case information and validation information stored in the Interim System database. Data retrieval includes both on-line and off-line functions. The Interim System is designed to be functionally similar to current BLM automated land and mineral recordation systems. Specifically, data retrieval includes all of the following tasks:

- **On-line retrieval** of township summary (TWPALL) information, including case land records, land status, parcel data, case status, and case serial number information.
- **On-line retrieval** of township land status information.
- **On-line retrieval** of all serialized case information using various query parameters (On-Line Case Abstract).
- **On-line retrieval** of Case Serial Numbers associated with specific customer information, document information, claim name information, and geographic name information using FIND capabilities.

- **On-line retrieval** of validation information for action codes, case types, and case type/action code combinations.

- **Generating off-line** Abstract Reports of serialized case information.

- **Generating off-line** reports that organize action code information according to user-specified selection criteria.

- **Generating off-line** reports that organize case type information according to user-specified selection criteria.

- **Generating off-line** Customer ID Lists.

- **Generating off-line** Land Reports and reports that organize land information according to user-specified selection criteria.

- **Generating off-line** reports concerning mining claim information.

- **Generating off-line** reports containing MMS data transfer information.

- **Generating off-line** reports that organize case serial number information according to user-specified selection criteria.

2.2 AALRS Tasks Covered in This Interim System Course

Briefly review the AALRS tasks addressed in this course.

Emphasize that the Interim System allows users to perform all of the data retrieval tasks formerly performed in AALRS (and more).

- Learn the terminology associated with this land and mineral records system.
- Retrieve all data associated with a serial number either in an abstract format or as separate pieces of data.
- Retrieve reports from the Interim System using case type data with selected parameters.
- Retrieve reports from the Interim System using action code data with selected parameters.
- Retrieve reports from the Interim System using customer name data with selected parameters.
- Retrieve reports from the Interim System using case status data with selected parameters.
- Retrieve reports from the Interim System using land disposition data with selected parameters.
- Retrieve reports form the Interim System using meridian, township and range data within selected parameters.
- Retrieve help reference for a specified data field.

3. Data Retrieval (BLM) Course Objectives

Write Objectives on a flipchart as each is reviewed.

The performance objectives outlined below should be met upon completion of the Interim System Data Retrieval course.

- Given a presentation on the concepts and terminology related to Relational Database Management Systems (RDBMS), the Interim System and SQL-standard databases, participants will be able to briefly describe the meaning and significance of these concepts and terms in their own words.
- Given access to the Interim System, a presentation on accessing the System and an in-class exercise, participants will be able to access and log onto the Prime computer and follow the necessary procedures to access the Interim System.
- Given available Interim System documentation and an overview of Report Processing forms and associated output, participants will be able to describe, in their own words, the purpose of reports available in the Interim System and the information these reports retrieve from the database.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the Interim System, moving among the Interim System menus and forms.
- access and use the TWPALL/Township Summary Form (CASE150F) to query the Interim System database for township summary information. Correct use of this form includes: entering appropriate selection criteria, navigating among the various fields and pages of the form, accessing the On-Line Case Abstract Form if appropriate, and requesting printed output of the queried data.
- access and use the Township Status Display Form (CASE303F) to query the Interim System database for the number of cases with case lands in each section of a given township. Correct use of this form includes: entering appropriate selection criteria, navigating among the various fields and sections of

the form, accessing the TWPALL/Township Summary Form if appropriate, and requesting printed output of the queried data.

- access and use the On-Line Case Abstract Form to query the Interim System database for on-line case data. Correct use of this form includes: entering appropriate selection criteria, navigating among the various pages of the form and the form's menu, accessing multiple records if appropriate, and requesting printed output of the queried data.

- access and use the FIND capabilities to query the Interim System database for data associated with specific case information. Correct use of these forms includes executing a database query with known case information.

- access and use the validation forms to query the Interim System database for valid action code, case type and case type/action code data. Correct use of these forms includes executing a database query to retrieve a subset of appropriate validation information.

- access and use Report Processing forms to enter selection criteria and request off-line Interim System reports.

Review Class Schedule.

Prompt for and answer questions.

4. Basic Interim System Information

5 Minutes
Briefly summarize each of the 10 sections that make up module 4 of this training guide (Basic Interim System Information).

Emphasize that this module of the course presents all of the prerequisite information users need before using the System's programs and forms.

This portion of the *Data Retrieval Training Guide* presents various types of basic information you will need to use the Interim System to your best advantage. There are ten sections in this portion of the training guide.

The first section presents an overview of the Interim System, and briefly describes what it is and why the BLM is switching to it.

The second section the elements and contents of the Interim System Documentation Library. This section also lists where you can obtain additional information concerning the System.

The third section covers the basic terminology and concepts necessary to understand the Interim System and communicate with other users in a common, consistent language.

The fourth section lists existing system and Interim terms compared and contrasted in class.

The fifth section lists Data Elements that may be new to BLM users as part of the BLM-wide data standardization effort.

The sixth and seventh sections discuss access to the Prime computer and the Interim System itself.

The eighth section explains in detail how all the function keys available in the System work. The last two sections discuss how to obtain on-line help and how to get out of the System if your terminal "locks up."

Although all of this information is covered by the course instructor(s), this information is provided to you in this training guide for future reference, so that you do not necessarily need to take extensive notes in class and so that you can use it to follow along during the presentation of this material.

4.1 Overview Information

25 Minutes
(The Interim System In Brief, Interim's Place Within the BLM Modernization Effort, Why Current Systems Are Being Replaced, the Core System and state's Sub-Systems, Release 1.0: A More Detailed Look, and Questions)

Explain what Interim System Release 1.0 is, and what Release 2.0 will be.

The Interim System (In Brief)

The Interim System is the Bureau of Land Management's newest land and mineral record system. It is replacing several older land and mineral record systems used by various BLM offices. Interim System Release 1.0 will replace the land and mineral record system currently used by the Alaska BLM. Interim System Release 2.0 will replace the record systems currently used by BLM offices in the lower-48 states, as well as Release 1.0 software.

The Interim System's Place Within the BLM Modernization Effort

Briefly mention the LIS concept, ALMRS as its land and mineral record keeping component, the Interim System as an intermediate step to the future ALMRS, and the record systems that Interim is replacing.

The Interim System is a step in the BLM's long-term modernization effort to automate existing manual systems and to improve current automated systems. Within the overall modernization effort, the BLM is working toward the concept of an integrated Land Information System (LIS), the goal of which is to organize and tie public land and resource information to the specific parcels of land created by the Public Land Survey System and managed by the BLM. The Automated Land and Mineral Record System (ALMRS) project addresses the land and mineral record keeping portion of the BLM's LIS concept. The Interim System is intended to serve as an intermediate stage between several different land and mineral record systems currently used by the BLM and the ALMRS of the future. When fully implemented, the Interim System will replace the following systems now in use: Case Recordation (C/R), On-line Retrieval Case Access (ORCA), Mining Claims Recordation (MCR) and the Alaska Automated Land Records System (AALRS).

The Interim System is named specifically to emphasize the time frame during which it will be used — the time between now and the future purchase, development and installation of new hardware and software (often referred to as the Target System) for the ALMRS/Modernization Project.

Why Current Land and Mineral Record Systems Are Being Replaced

Review the two primary reasons for moving to the Interim System (as well as the advantages): Database Modernization & Data Standardization for the BLM.

There are two primary reasons for moving the BLM's public land and mineral record keeping process onto the Interim System. The first reason is to modernize the type of database used to store land and mineral records. Most land and mineral record systems currently used in the BLM employ network model databases that are outdated. The Interim System uses a current, industry-standard relational database management system, Oracle®, to store and manage land and mineral information. There are significant technical advantages that a relational database model has over network models (these will be discussed later), and the switch to the Interim System allows the BLM to take advantage of them.

The second reason to replace current systems with the Interim System is standardization: standardization of data, standardization of the database used to store and maintain public land and mineral information, standardization of the system used to enter, maintain and retrieve data, and standardization of the computer hardware on which the system runs. The BLM currently stores public land and mineral information in many places and in many different formats, and the sharing of data among systems and people is constrained by the number of different systems and the appearance of their information. Current BLM modernization efforts are looking to a future in which land and mineral records (as well and cadastral survey and resource information) are available to BLM, government and public users nation-wide in a common form that can be stored, maintained and shared. This open flow of information is a vision for the future, but the Interim System represents a significant first step toward standardizing land and mineral record data throughout the BLM and the system with which users access that information. Interim is designed to pave the way for the Target System and make the transition to this future system less difficult.

The Interim System Core and Sub-Systems

Describe the concepts of the Core System and each state's Sub-Systems.

The Interim System, as implemented in each BLM state, will actually consist of two parts. The first part can be referred to as the Core System. This portion of the Interim System has been developed at the Service

Center and contains the land and mineral record system functions common to all states. When fully implemented, the Core of the Interim System will be the BLM's standard automated land and mineral record system.

The BLM recognizes that each state has unique land and mineral record automation needs not addressed by the Bureau-wide Core System. To meet these needs, each BLM state can develop its own unique additions to the Core System. These unique, state-specific functions make up the second part of a state's Interim System: its Interim Sub-Systems. Since each state can develop individually tailored additions to the Core System that it feels are necessary for its day-to-day operations, its Sub-Systems are likely to be incompatible to some degree with other state's Sub-Systems.

Prompt for and answer questions.

Release 1.0 of the Interim System: A More Detailed Look

Restate the purpose and scope of Release 1.0 of the Interim System.

Release 1.0 of the Interim System is a software package designed to replace those portions of the Alaska Automated Land Records System (AALRS) that are similar in function to the land and mineral records systems used by BLM offices in the lower-48 states. It is the Alaska BLM's Core Interim System.

Discuss the replacement of AALRS on the Burroughs computer with Interim System Release 1.0 on a Prime computer.

The outdated Burroughs computer system that hosted AALRS has been replaced by a newer Prime computer hosting the Interim System. The land and mineral record needs of the Alaska BLM had outgrown the overloaded (and expensive to maintain) Burroughs; the new Prime alleviates these data storage difficulties and costs less to maintain.

Review how the Interim System uses an industry-standard relational database structure, and why it is replacing older network database models used by the BLM.

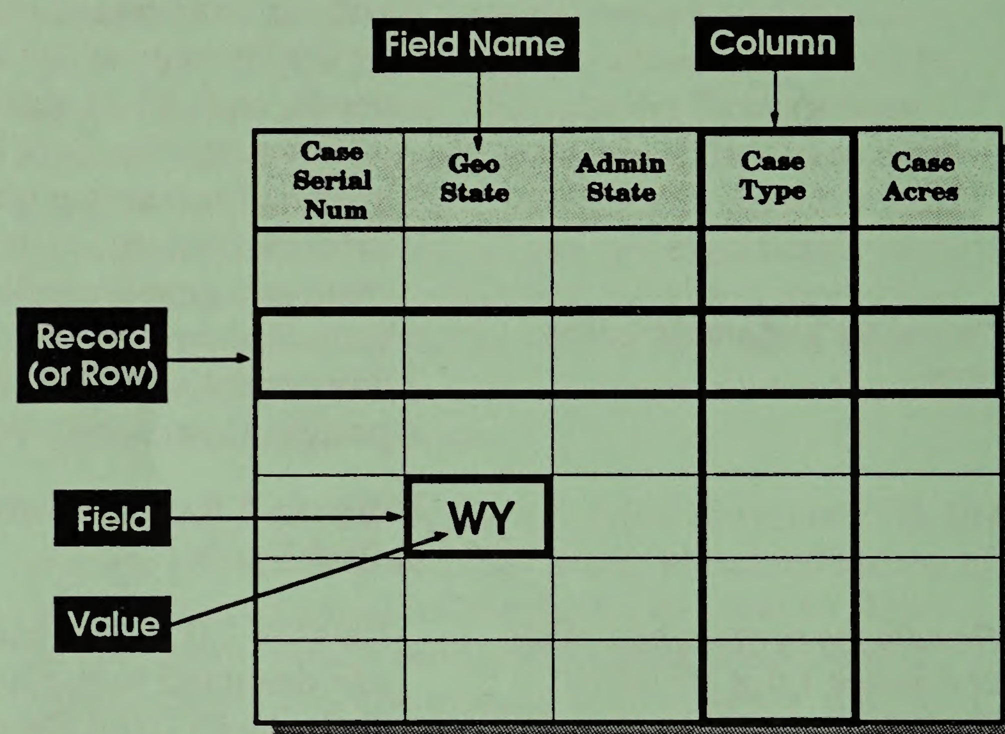
Like AALRS, Interim is an automated land and mineral recordation system that allows you to store, maintain and retrieve case record information. Unlike AALRS, however, the Interim System uses the newer *relational* database structure that is becoming standard throughout private industry and government.

Current BLM systems use an older *network* database model that stores some information as values and other information as pointers. Only information stored as pointers can be used to link the values in one record to those in another. Unfortunately, the decision to store information as a pointer or as a value must be made when the database is established. To change the

basic structure of a network database requires significant reworking of the computer code that operates the system.

Briefly describe how a relational database organizes and stores information.
Refer to the Generic Database Table diagram and wall display.

A relational database, such as that used by the Interim System, organizes data into tables of related information.



Tables consist of vertical columns and rows. A column identifies a single data element and is given a name (e.g., Action Code). Rows cut across columns and are made up of fields that may contain values. A series of fields make up a record which corresponds to a row in a table. In a relational database, any two or more tables can be related to one another by including a common column between them. By relating tables in this way, it is relatively simple to tie the information from many different tables together.

Briefly review some advantages of relational databases.

Unlike a network database, you can easily modify or add to the basic structure of a relational database. New tables with columns common to other existing table columns can be added and thus related to other information quickly. It is also a simple process to add new columns to existing tables and to establish new relationships among the data, as well as to modify existing columns. As the needs and demands placed on a relational database change and grow, the very organization of and interrelationships within the database can be modified to accommodate them. As the needs of the BLM change over the years, the Interim System can be expanded and altered signifi-

cantly to accommodate these changes without having to start all over again with yet another new recordation system.

Discuss how BLM data standardization efforts are reflected in the Interim System, and how some data elements have been added, deleted and changed.

As discussed earlier, the switch from existing systems to the Interim System is also helping the BLM to take significant steps forward in an on-going effort to standardize automated data. In using the Interim System, you will begin to see some of the results of this standardization in many of the data elements used to record case information. As part of your training for the new system, you will receive explanations of how any data element changes might affect your work.

Review the results of switching from AALRS to Interim System Release 1.0 for the Alaska BLM. Write these results on a flip chart during the review.

In summary, the transition from the Alaska Automated Land Records System (AALRS) to the Interim System results in the following:

- Moves the Alaska BLM recordation system off of the old, overloaded Burroughs computer onto the newer Prime computer system.
- Replaces an older network database model with an industry-standard relational database.
- Gives the BLM a significant start in the process of standardizing automated data.

Prompt for and answer questions.

4.2 Documentation Available for the Interim System

20 Minutes
(Interim System Documentation and How to Obtain More Information Concerning Interim)

Discuss each element in the Interim System Documentation Library.
Refer to and display each element of the Library as it is reviewed.

Prompt for and answer questions concerning each element of System Documentation before moving on to discuss the next element.

Specific documentation products have been created for the Core Interim System, and are all part of the Interim System Documentation Library. The Documentation Library contains several major elements, or books, that each provide a unique set of information to the user. These elements are:

Introductory Materials — The Introductory Materials provide the user with information that applies to the entire documentation library.

Chapter 1 discusses the overall objectives and purposes of the Interim System and why it is replacing the older automated land record systems in the Bureau of Land Management.

Chapter 2 explains the organization and usage of the documentation, the graphic and typographic conventions used throughout the documentation library, and defines some common terms used throughout the documentation.

Chapter 3 explains how to get started using the Interim System, including: System login procedures, terminal type configuration, List of Values (LOV) usage, Quick Transfer (QXFER) usage, and other pertinent System functions.

User's Handbook — The User's Handbook contains usage and function information on each Menu, Form, Page and Field in the System. It follows the design and organization of the System's menu structure. Each chapter in the User's Handbook corresponds to a menu item on the System's Main Menu that appears when you enter the System. Each subsequent section in the chapters matches the organizational structure, and is numbered accordingly, for all of the elements depicted on the Interim System Map.

Reference Guide — The Reference Guide contains information on each piece of the System organized alphabetically by menu, form or field.

Chapter 1 contains an alphabetical listing of each menu in the System followed by a brief explanation of the menu's purpose and the available options.

Chapter 2 contains a listing and description of each form found in the System, including purpose, use, structure and content overview. The forms are listed in order of their Program Name, such as CASE125F, rather than alphabetically by name.

Chapter 3 contains an alphabetical listing of each field found within the System. The alphabetical listing follows the BLM standard Data Element Dictionary abbreviations of the standard abbreviation of the field as it is used throughout the System. Each field's listing contains a description of its use and, if applicable, its Data Element number.

Glossary of Terms — The Glossary contains an alphabetical listing and definitions of useful System and case recordation terms used in documentation.

Appendices — The Appendices contain various supplemental information to assist users.

Appendix A contains the keyboard mapping for the various terminals supported by the System.

Appendix B contains a listing of the error messages in the System with troubleshooting descriptions.

Appendix C contains a complete core System Map.

Appendix D contains data matrix information that crosswalks older data element numbers with newer, revised codes.

Index — The Index contains an alphabetical listing of subjects contained throughout the System Documentation Library. Each subject entry in the index identifies the documentation element in which the reference can be found and then the page number within that particular documentation element.

Keyboard Templates —The physical Keyboard Templates for each of the various terminals supported by the System.

Quick Reference Guide —The Quick Reference Guide is a one-page sheet that briefly outlines System content, structure and functionality.

Training Guides — There are eight Training Guides, one for each of eight courses developed to address various sections of the Core System.

How to Obtain More Information Concerning the Interim System

Review how course participants can obtain more information concerning the Interim System (contact personnel, addresses and phone numbers).

There are two primary sources of Interim System information for topics not covered in the Interim System Documentation Library: your BLM State Office and the Field Operations Section of the BLM Service Center.

In your BLM State Office, more information can be obtained from: (or the equivalent in your state)

LIS Project Coordinator
Division of Information Resource Management
BLM Alaska State Office
222 West 7th Ave., #13
Anchorage, Alaska 99513-7599
Phone: (907) 271-5057
FAX: (907) 271-4595

The Service Center's Interim Staff can be reached at the following address and telephone numbers:

Chief, GIS Support Section
Bureau of Land Management (SC-344C)
Service Center
Building 50, Denver Federal Center
Post Office Box 25047
Lakewood, Colorado 80225-0047
Phone: (303) 236-0987
FAX: (303) 236-0831

4.3 Interim System Database and Structured Query Language (SQL) Concepts and Terms

1 Hour

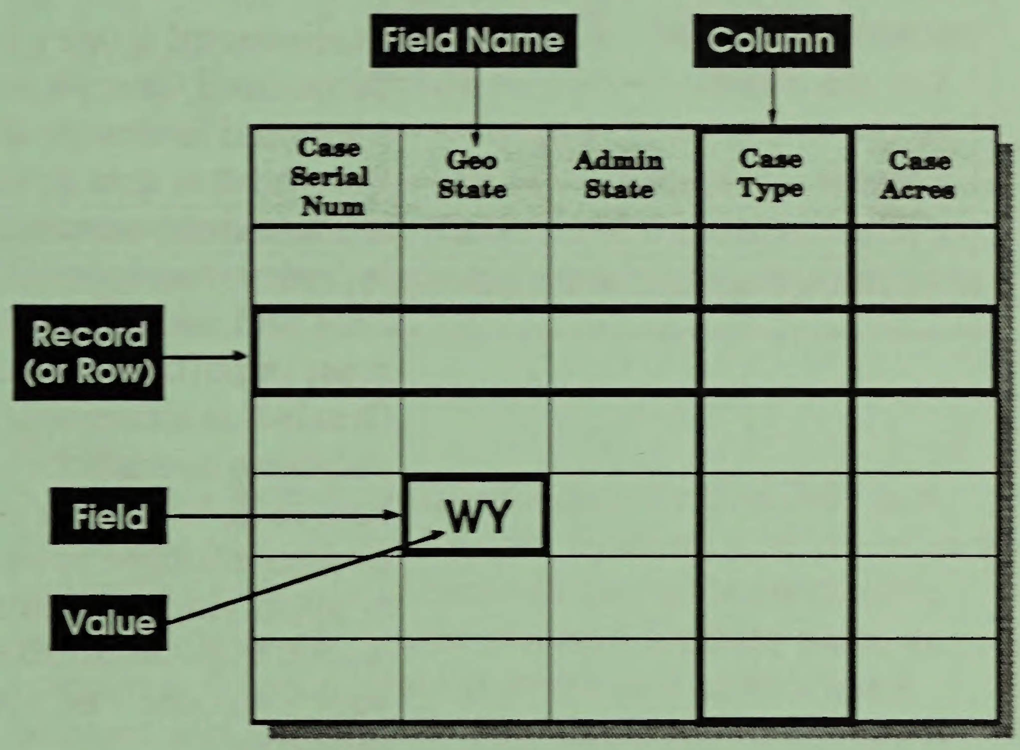
Briefly review each of the concepts/terms listed in 4.3 Interim System Database and SQL Concepts and Terms.

Use the appropriate training aids, as needed, for each concept/term: Instructor's Computer, LCD Panel and Overhead Projector, Training Wall Displays, System Map, Flipcharts, Whiteboards, Markers, Training Guide diagrams, System Documentation and Data Element Dictionary.

Prompt for and answer questions concerning each concept/term before moving on to discuss the next concept/term.

- **Database**
  An automated database usually refers to a collection of information organized as interrelated files created and managed by a Database Management System (DBMS).

- **Relational Database Management System**
  A Relational Database Management System (e.g., Oracle®) organizes data into Tables of related information. The Table is the only type of data structure used in Relational Database Management Systems. Tables consist of vertical columns and horizontal rows:



A column identifies a single data type and is given a field name such as Geo State. Rows cut across columns and are made up of fields that may contain values. In an Oracle® database, a field can store one of three data types: numbers, characters or dates. A series of fields make up a record which corresponds to a row in a table.

In a RDBMS, any two or more tables can be related to one another by including a common column between them. By relating tables in this way, it is simple to tie the information from many different tables together. In the Interim System, the Case Serial Number is a field that ties many of the System's primary tables together.

One of the biggest advantages of a RDBMS is that, unlike earlier databases, the basic structure of the database can be modified easily. New tables with columns common to other existing table columns can be added and related to other information in the database quickly. It is also a simple process to add new columns to existing tables and to modify existing columns. As the needs and demands placed on a RDBMS change and grow, the organization of and interrelationships within the database can be modified.

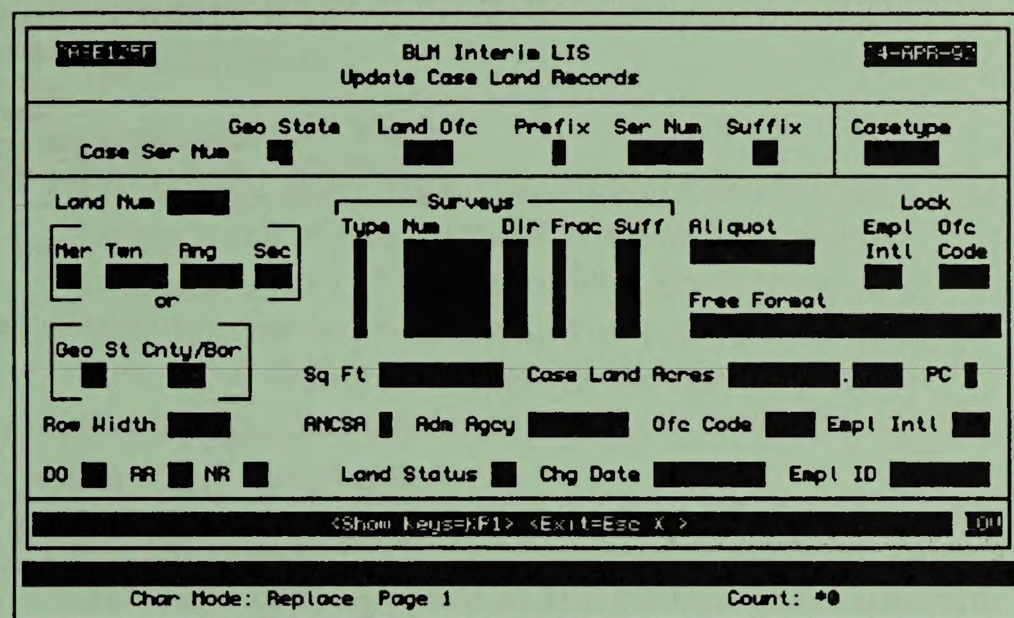
- **Oracle®**
  A set of Relational Database Management System software programs created by Oracle® Corporation.

- **Structured Query Language (SQL)**
  Structured Query Language (SQL) is an English-like command language that allows a user to directly affect the contents and structure of tables as well as the relationships among tables in a database. SQL is an industry standard RDBMS language developed by IBM and used with Oracle® databases. One of the most important features of SQL-based RDBMS's like Oracle® is automatic navigation; as a user, you specify database operations in terms of what is to be done, not how to do it. With a single SQL command, you can update multiple rows in the database without knowing or specifying data location, storage format or access paths. SQL-based RDBMS's let you concentrate on your data and free you from System-level details and concerns.

- **SQL*Forms®**
  SQL*Forms® is the Oracle® software tool that creates and controls the user interface for all of the Interim System. The primary component of SQL*Forms® is the form.

- **Form**
  A form created with Oracle's SQL*Forms® is used to enter, modify, delete or query information in an Oracle® database such as the Interim System database. To change or retrieve database records without a form, you must use SQL commands. A large majority of Interim System users will interact with the database using forms designed specifically for that purpose.

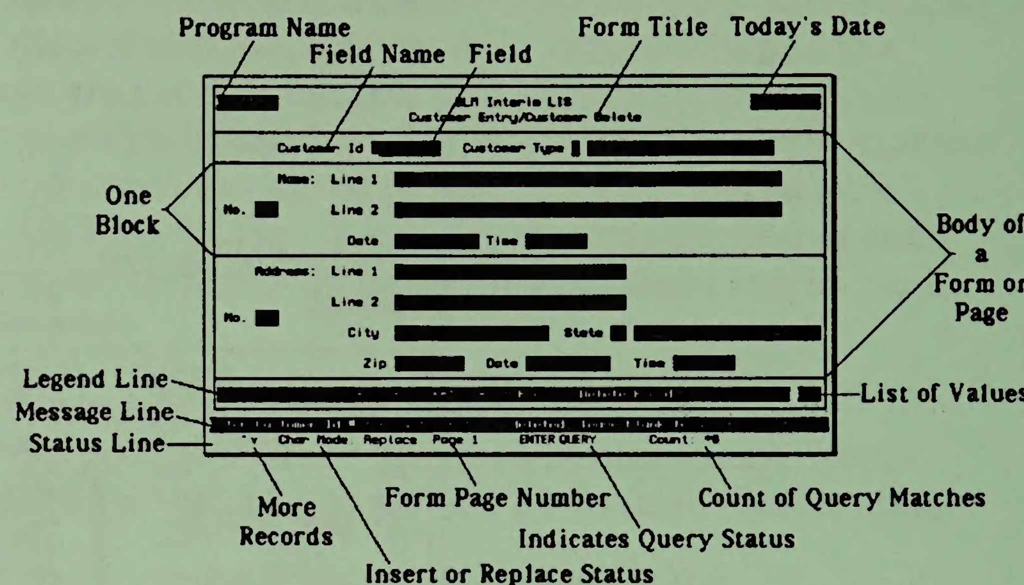
Forms are designed to resemble fill-in-the-blank printed documents (e.g., Income Tax forms, credit card applications). To a user, a form looks like a computer screen layout containing graphically identifiable blank spaces that are usually labelled. These blank spaces are called fields. An example of an Interim System form looks like this:



- **Field**
  A field on a form corresponds directly to a field in a database table. In the Interim System, a field's label is equivalent to the field name in the table containing that field's values. Fields are used for data entry or update on Interim System forms and have a fixed position and size. Fields may also have other restrictions or requirements for data entry. If you enter, update or delete information in a field on a form, you are causing a corresponding change to the field's value in the associated database table.

- **Status Line**

  A Status Line appears in addition to other standard information on all Interim System forms:



Occasionally, the System uses the Status Line to display an instruction or message that carries over from the Message Line above. Normally the Status Line may contain the following information (from left to right):

^

The carrot indicates that there are records preceding the current record (or the top record displayed in a list of multiple records). You can display these records by pressing the PREVIOUS RECORD function key. The ^ may appear with the **v**.

v

A lower case **v** indicates that there are records following the current record (or the bottom record displayed in a list of multiple records). You can display these records by pressing the NEXT RECORD function key. The **v** may appear with the ^.

Char Mode:

The Status Line always lists the Character Mode that you are in, `Insert` or `Replace`. Your keyboard template lists the key to press to toggle back and forth between insert and replace mode.

Page X:

The current page number of the form you are using always appears on the Status Line. Only multi-page forms have page numbers greater than one.

Enter Query:

The words `Enter Query` appear on the Status Line when you press the ENTER QUERY function key. These words stay on the Status line until you press either the EXECUTE QUERY key or the EXIT/ CANCEL key.

Count:

The count listed at the far right of the Status Line keeps track of the number of records retrieved during a query of the database. Each time you display a record returned by a query, the count is increased. When you display the last record retrieved by a query, an asterisk (*) is displayed before the count value.

- **Message Line**
  A Message Line appears at the bottom of all Interim System forms just above the Status Line. The Message Line usually displays instructions crucial for using the form or lists options you may have at any point in your workflow on the form.

WARNING:

Always pay attention to the Message and Legend Lines in order to avoid making time-consuming errors when using forms.

- **Legend Line**
  A Legend Line appears at the bottom of most Interim System forms just above the Message Line. The Legend Line usually lists function key options available for your use on the form. These function key options list the specific keys on your keyboard to press to perform the function. Occasionally, the System uses the Legend Line to display a temporary instruction or message crucial to your workflow on the form. On a few forms in the System there is no Legend Line.

- **Page**
  A page is a single computer screen layout in a form. A form may be made up of a single page or many pages. If a form occupies two or more computer screen layouts, each individual screen is called a page. If a form consists of only one page, then the terms form and page are interchangeable. The Interim System has several multi-page forms (e.g., CASE100F, CASE127F). See the Interim System Map for other examples of single page forms and multi-page forms.

- **Menu**
  A menu is a specialized form that offers a list of Options (1, 2, 3,..., etc.). You choose an option by either moving a pointer (using the up and down arrow keys) to the position beside your desired option and pressing NEXT FIELD/TAB or by typing the option number and pressing NEXT FIELD/TAB:

- **Option**
  An option is a selection choice on an Interim System menu . Options may move you to a specific form, a submenu, or the next higher-level menu.

- **Program Name**
  Each Interim System form is controlled by an Oracle® program created with Oracle's SQL*Forms®. Each Interim System form's program has a specific program name (e.g., CASE100F, CASE105F). The program name of each Interim System form appears in the upper left-hand corner of each form/page. Experienced users of the Interim System can often use program

names in conjunction with the QXFER function to access a specific form more quickly than by using all the intermediate menu(s) and option(s).

- **QXFER**
  A field labelled **QXFER** ("quick transfer") appears at the bottom right of all Interim System menus and submenus. When you move the cursor into this field, by following the instructions at the bottom of the menu screen and typing the Program Name of a form, you go directly to that form, by-passing menus and submenus. Using the QXFER function requires that you know the program name of the form you want to access.

- **Screen**
  In all Interim System documentation, the term screen refers to a single computer screen layout. A screen may be one page of a multi-page form, a whole form (if it occupies only one page), an Interim System menu or submenu, or any of a variety of help screens and List of Values (LOV) screens:

NOTE:

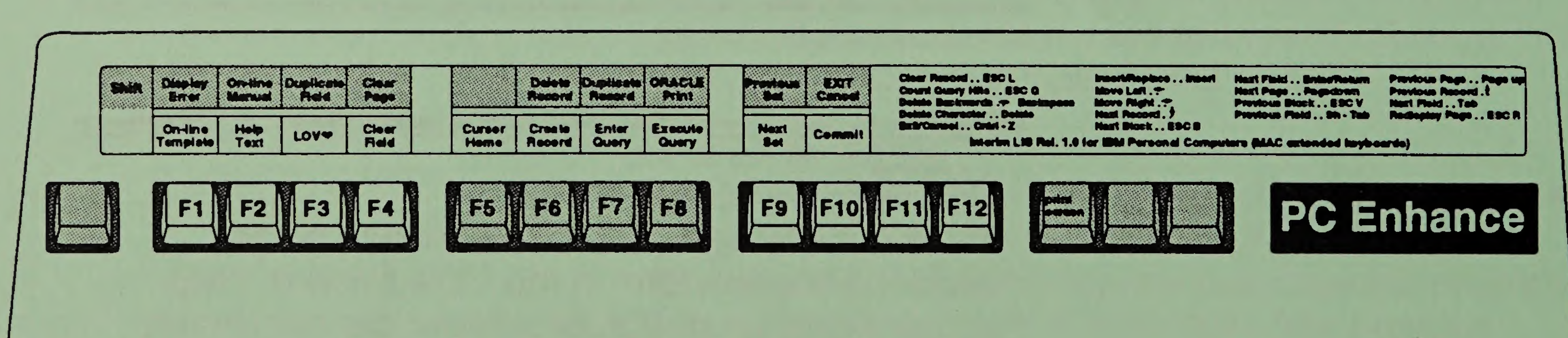
The Interim System Map depicts each page (screen) of each form in the Core System. Help screens and List of Values screens are not shown on the Interim System Map.

- **Function Keys**
  When using the Interim System, you will press certain keys on your keyboard to move the cursor, enter, change or delete data, or tell the system to store information in the Interim System database. These keys are called function keys because they carry out the operations or functions available in the System's programs. Any number of keystrokes can be designated a function key (e.g., [F6], [PF4], [Shift]-[F10]). If the first key name in a two-keystroke sequence is CTRL or SHIFT, hold the first key down and press the second key simultaneously. If the first key is [Esc], press it first and release it, then press the second key.

NOTE:
Because the Interim System is used on several different terminals with different types of keyboards (e.g., Prime PT250's, Pericoms, PC Enhanced, and Compaq Portable III's), it is impossible for a function like EXECUTE QUERY to always be activated by the same key(s).

To avoid the confusion of referring to keyboard-specific keys, all Interim System documentation refers to function keys by their purpose, using names only such as PREVIOUS FIELD, ENTER QUERY, and LOV.

For each terminal type, key names are assigned to specific keys. The appropriate Interim System keyboard template for your terminal type depicts the proper key(s) to press to activate Interim System function keys as illustrated in this example:



Some function keys (e.g., NEXT BLOCK) do not work when you are in the entering or executing a query.

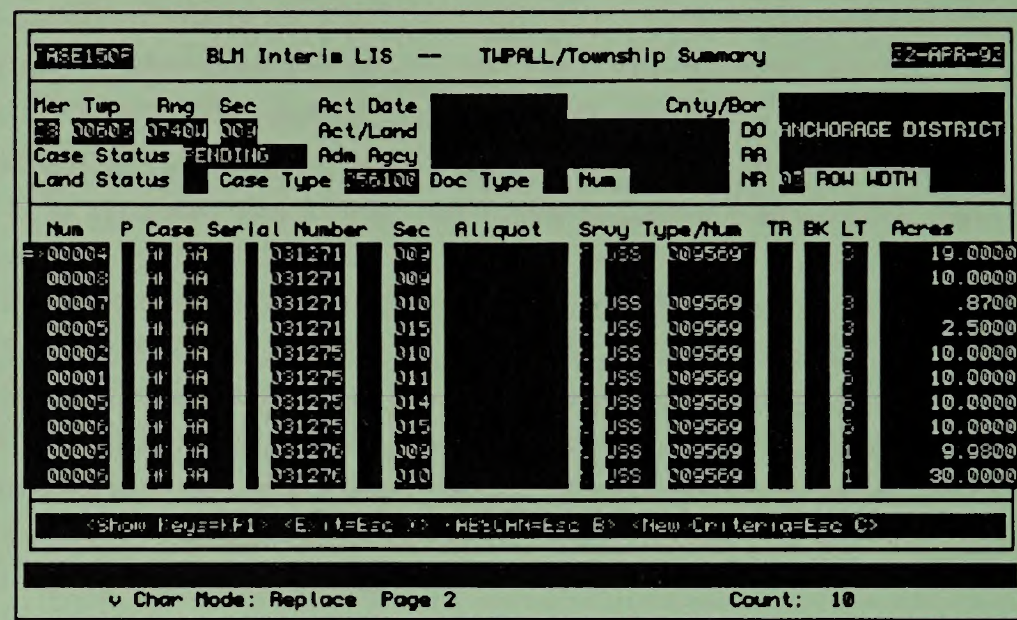
LOV ❤

• **LOV**
LOV stands for "List Of Values." When you move the cursor into certain fields on a form or page, the letters LOV appear at the bottom right of the computer screen. By pressing the LOV key indicated on your template, a List of Values screen appears. This LOV screen provides you with a list of the valid values for the associated field on the form. The System allows you to scroll down through the list quickly and easily, choose the value you need and return with it to the field on the form. Lists of Values and the LOV function are handy ways for Interim System users to ask the database for help in completing fields on forms.

DE 2929
or...
LOV ❤

• **Validation**
In certain fields in the Interim System, information you enter is validated before you are allowed to move to the next field. When you press NEXT FIELD in these fields, the System compares your input with a list of acceptable values in the System's validation tables. The list of acceptable values for fields may be affected by data you previously entered. An error message appears in the message line at the bottom of the form if the value you enter for a particular field is unacceptable; if this happens, the LOV (list of values) function key or the *Data Element Dictionary* may provide alternative inputs.

• **Database Query**
A database query is performed whenever the Interim System retrieves data that you have specified, either for on-line display or off-line reports. Database queries are often performed automatically as you use a form. You may also specifically request a database query on many forms/screens throughout the System using the ENTER/EXECUTE QUERY function keys delineated on the template. These function keys allow you to alert the System that you want it to search for and retrieve specific information and to specify selection criteria to guide it in its search of the database. An example of an Interim System screen that allows the entry of Selection Criteria for a Database Query:



- **Selection Criteria**
  Selection criteria are the parameters you enter that define the value(s) and/or records to be searched for and retrieved from the Interim System database tables. Given your search criteria, the System searches its tables for the information you are asking it to retrieve. If found, this information appears in the appropriate field(s) on your screen or is written to the appropriate off-line report.

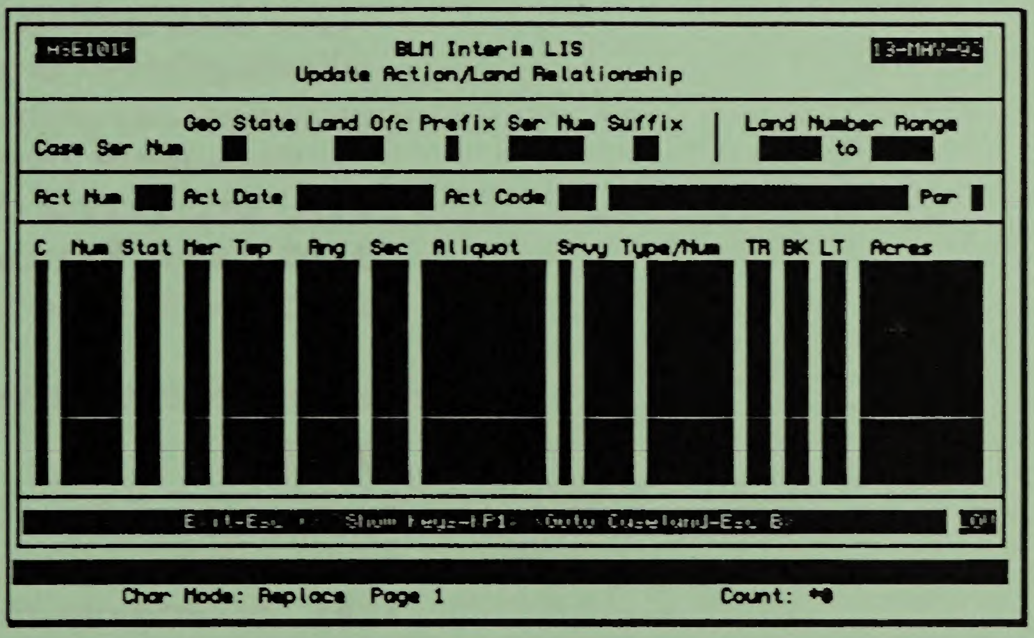
- **Commit**
  When you commit information to the Interim System database, you automatically save the data you have entered into a form's fields in the appropriate Interim System table(s). Committing data to the database directly affects the data stored in the Interim System and saves new information, changes to existing information or deletions of previously saved data. Before the System allows you to commit data, all the mandatory fields in a form must contain acceptable values. Many System validations are performed to insure that incorrect data are not committed to the database.

- **Exit**
  When you exit a form by pressing the EXIT function key, you literally leave the form you are using and return to the menu you were on before accessing the form. Unless you commit data to the database before exiting the form, no data is saved. Most forms in the System ask you if you really want to quit (exit) when uncommitted information may be lost. Some forms,

however, do not double-check when you press EXIT, and you lose all uncommitted data and leave the form.

- **Cancel**
  Whenever you are in the middle of querying the database, you may cancel that query using the CANCEL function key. For example, if you begin to enter selection criteria for a query and then decide you do not need to query the database, canceling the query resumes normal System functioning.

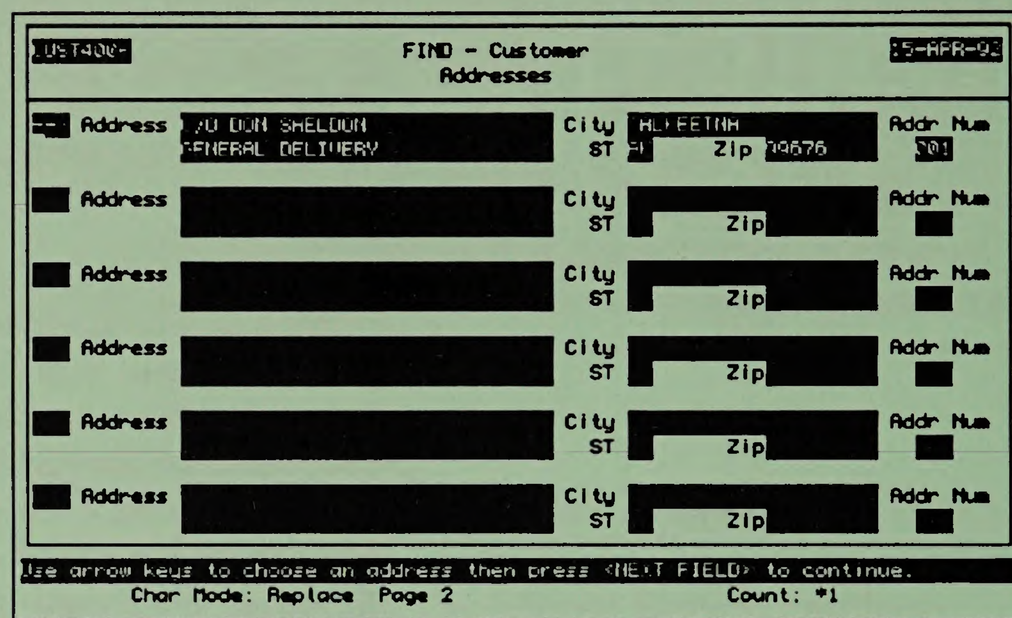
- **Block**
  A block is a group of fields on a form that typically relates to one database table. Forms may be composed of one or more blocks. In the Interim System, fields in a block are located together physically (i.e., fields from different blocks are not scrambled together), but on multi-page forms, the fields in one block may be spread over two or more pages. The following is an example of an Interim System form clearly divided into several Blocks of fields:



NOTE:

Although knowledge of blocks is not necessary when using data retrieval forms, block function keys can increase the efficiency of experienced users. Beyond data retrieval, knowledge of blocks and familiarity with block function keys is essential for working in the Interim System.

- **Set**
  A set is a group of records (i.e., rows) from a database table (or tables). In the Interim System, sets of records appear on those forms specifically designed to display multiple records simultaneously.



- **Interim System Date Format**
  When entering dates into the Interim System, the following format is used `DD-MON-YYYY`. `DD` is the numerical day of the month (e.g., `01`, `17`, `31`). `MON` is the three-letter abbreviation of the month (e.g., `JAN`, `APR`, `JUL`). `YYYY` is the full four-digit year (e.g., `1776`, `1991`, `1894`). Examples of Interim System dates are `28-JAN-1991` and `30-AUG-1966`.

NOTE:

System messages may not display dates using the full four-digit year as is required for input. `28-JAN-1991`, for example, may appear as `28-JAN-91` in some System messages.

- **Data Element**
  An aggregate of data that specifies an item of information at or near its basic level. An elementary item (e.g., month) contains no subordinate items. A group item (e.g., date) may consist of day, month and year subcomponents and still be defined as a single Data

Element. A Data Element may consist of a specific value which can be numeric, alphabetic, or a combination of both (alphanumeric).

- **Data Element Dictionary (DED)**
  The BLM's data element dictionary is a repository for all definitive information about the data elements including their use, meanings, sources, characteristics, relationships, authorities, etc.... It contains data, the descriptions of data plus how the dictionary functions. Examples of contained data are state and county/borough names and numbers, case types and action codes.

  The Interim System uses a subset of the BLM's DED; this subset is called *Application 2006*, and specifically refers to those Data Elements valid within the Interim System.

4.4 Interim System - AALRS Terminology Comparisons

10 Minutes

Briefly compare (and contrast, if necessary) Interim and AALRS terms, either individually or in pairs or groups. Discuss exactly what each Interim Term listed in this section means or describes, and compare/contrast this with AALRS.

Prompt for and answer questions concerning each term/ comparison before moving on to discuss the next term or comparison.

- On-line
- Off-line
- Report
- Screen Display
- Screen Dump
- Interim Customer vs. AALRS Applicant
- Interim: Action Code and Date in action record, Action/ Land Relationship, Document Type/Number, and Land Status

  AALRS: Conveyance Prefix Code and Disposition Number

  (Both systems have a way of showing that an action has affected the status/disposition of case lands within the land records themselves and to record document information concerning specific case lands.)
- Void
- Delete
- Interim Menu-driven vs. AALRS Command-driven (In Interim, QXFER is the fastest method of navigation)
- Action Number and Land Number
- Meridian Code

4.5 New Data Elements Being Introduced to Many BLM Users with the Interim System

5 Minutes

Briefly mention the data elements listed in this section. A detailed discussion of these data elements is unnecessary at this time, since each will be seen and discussed on the forms covered in this course.

Prompt for and answer questions before moving on to discuss the next section.

- Administrative State
- Case Status
- FRC information
- Interest Relationship
- Customer Name Number and Customer Address Number
- Percent Interest
- Action Code - Case Type Matrix
- Action Remarks
- Disturbed Acres
- Case Acres
- Land Status
- Case Acres Balance
- Survey Direction, Fraction, Suffix
- Square Feet
- Case Land Acres
- Administrative Agency
- BLM Pending Entity
- Other Pending Entity
- 2nd Date Type
- Commodity Code
- Measurement Code (units)
- Measurement Quantity
- U.S. Rights Code
- Lock Action Word and Lock Land Word

4.6 The Interim System and the Prime Computer

5 Minutes

Mention that Interim uses the Oracle® RDBMS hosted on a Prime minicomputer.

The Interim System is a software package that uses Oracle® Corporation's Relational Database Management System (RDBMS); this RDBMS is often referred to simply as "Oracle®." Interim System and Oracle® software programs control all aspects of the Interim System database and the computer screens you use to enter, change, delete or retrieve land and mineral recordation data.

All the Interim System and Oracle® software you use runs on a minicomputer manufactured by Prime Computer, Inc. Before you can begin using the Interim System, you must log onto the Prime Computer.

NOTE:
Individuals needing Prime operating system (PRIMOS) experience beyond the scope of this module should seek proper training in PRIMOS and Interim System technical support. For more detailed information concerning PRIMOS, refer to the Prime Computer, Inc. documents entitled *Prime User's Guide* and *PRIMOS Commands Reference Guide*.

Discuss, if appropriate for course participants, the procedure for obtaining a Prime computer user ID and password.

Before using the Prime computer, you may first need to register with your Prime computer System Manager to obtain a user ID. You may also receive a password and/ or a project ID at this time if your state's system uses these. With a valid user ID (and password and/or project ID), you are ready to log onto the Prime and do some work. After turning on your terminal, you login on the Prime computer system with your user ID. The operating system may also prompt you for your password and a project ID.

Review and demonstrate, using the Instructors's computer, LCD Panel and overhead projector, the step-by-step process for logging onto the Prime Computer.

Once you have logged into the Prime Computer successfully, you may then go on to run the Interim System software. Although the login procedure in your state may vary somewhat, a generic step-by-step review of how to login on Prime computers follows:

STEP 1 With your terminal on, enter the word `LOGIN` and press RETURN.

STEP 2 Once you enter `LOGIN`, the computer prompts you with `User id?`. At this prompt, enter the user ID assigned to you and press RETURN. Your user ID is a name or character string that is one to 32 characters in length. It may be your last name, your first name, some combination of the two, or some other set of characters that uniquely identifies you to the computer's operating system. You must always provide a user ID to login to the system.

NOTE: The step-by-step Prime login procedure outlined in this training guide is generic and may not match the procedure in your state. Substitute the appropriate steps, as needed.

STEP 3 Once you enter your user ID, the computer may prompt you with `Password?`.

NOTE:
Passwords are not used on all Prime computer systems; if your state does not require a password as part of the login procedure, skip this step.

At the `Password?` prompt, enter your password and press RETURN. Your password does not appear on the screen as you enter it in for security reasons. Your password is a character string between one and sixteen characters long and known only to you and the computer System Manager. By requiring a password, the operating system helps prevent others from logging onto the computer with your user ID.

STEP 4 Once you enter your password, the computer may prompt you with `Project id?`.

NOTE:
Project ID's are not used on all Prime computer systems; if your state does not require a project ID as part of the login procedure, skip this step.

At the `Project ID?` prompt, enter the project ID appropriate for your particular job and press RETURN. Project ID's provide a way for your state's Prime computer System Manager to organize users into specific groups. Some states may group all Interim System users within a unique project. Other

states may have different project ID's established for different Interim System tasks; if you receive the `Project id?` prompt and do not know the proper ID to enter, ask your supervisor or the Database Administrator (DBA).

STEP 5 Once you have successfully entered your user ID (and in some states, your password and/or project ID), the Prime computer returns a set of information to your terminal that indicates you have logged onto the system. The following example provides a sample of the login script received by a user from the Denver Service Center's Prime.

```
JOHN DOE (user 78) logged in Monday, 25
Mar 91 08:25:45.

Welcome to PRIMOS version 22.2.2.R11v

Copyright (c) 1989, Prime Computer, Inc.

Serial #IDC9-VVQK53-NM02 (BUREAU OF LAND
MANAGEMENT)

Last login Friday, 22 Mar 91 13:04:20.

---> For help in MAIL enter H at the •
prompt.

[EDIT_CMD_LINE Rev. 22.1.0 Copyright (c)
1989, Prime Computer, Inc.]

[Serial #IDBR-U9QGJ5-F22W (BUREAU OF LAND
MANAGEMENT)]

Editing command input with ECL.
(EDIT_CMD_LINE)

[MAIL Rev. 2.1.1-22.0 copyright (c) 1989,
Prime Computer, Inc.]

[Serial #IDAG-CQQH53-6B8L (BUREAU OF LAND
MANAGEMENT)]

* q

OK,
```

STEP 6 The * prompt at the end of the login script indicates that you are in the Prime computer's MAIL utility. Enter `HELP` at the * prompt if you want assistance in using MAIL. Enter `q` (as shown above) or `Quit` to exit the MAIL utility and enter the PRIMOS environment.

Prompt for and answer questions.

On most Prime systems, the PRIMOS prompt indicating that the computer is ready to receive commands is `OK,`.

4.7 Interim System Access Procedures and System Security

4.7.1 Logging Into the Interim System

10 Minutes
(Logging into the Interim System, Exercise B-1, and Interim System Security)

Discuss, if appropriate for course participants, the procedure for obtaining an Oracle® user ID and password.

Review and demonstrate, using the Instructors's Computer, LCD Panel and Overhead Projector, the step-by-step process for logging into the Interim System.

Before you attempt to enter the Interim System's Oracle® environment and run the Interim System software, you may first need to register with your Database Administrator (DBA) to obtain an Oracle® user ID. This ID may or may not be identical to your Prime user ID; both ID's serve a similar purpose — one allows you to access the Prime, the other allows you to access the Interim System's Oracle® environment. Depending on your state's Interim System access procedure, you may also receive an Oracle® password from your DBA. Like the two different ID's, the Prime and Oracle® passwords serve similar security functions for their respective environments.

Although the procedure for accessing and running Oracle® and Interim System software may vary in your state, a review of the BLM Service Center procedure provides a basic example of the Oracle® login process:

STEP 1

Once you are in a directory on the Prime computer from which you can access Interim System software, you must prompt the operating system with a command to begin the startup or entry procedure to Oracle® and the Interim System. Although your state's DBA and System Manager may define this command differently, the one used at the BLM Service Center is `LISMENU`. Thus, to enter the Interim System, enter `LISMENU` at the Prime `OK,` prompt and press RETURN.

NOTE: The step-by-step Interim System login procedure outlined in this training guide is generic and may not match the procedure in your state. Substitute the appropriate steps, as needed.

Depending on how your DBA and System Manager have structured the Interim System startup procedure, the `LISMENU` command may present you with a sequence of computer prompts that verify your right to access the Interim System Oracle® environment. The following steps review the appropriate sequence of prompts and user responses to access the Interim System at the BLM Service Center. Remember that your state's system may prompt you differently or not at all.

STEP 2 After entering `LISMENU`, the Prime computer prompts you with the following:

`BUREAU OF LAND MANAGEMENT - INTERIM LIS`

`Input your user id>`

At the `Input your user id>` prompt, enter the Oracle® user ID assigned to you by your Database Administrator and press RETURN. If you do not know the appropriate Oracle® user ID to enter, contact your supervisor or your DBA.

STEP 3 When you enter your Oracle® user ID, the computer prompts you with `Input your password>`. At this prompt, enter the Oracle® password assigned to you by your DBA and press RETURN. Your Oracle® password does not appear on the screen as you enter it in for security reasons. Again, if you do not know the appropriate Oracle® password to enter, contact your supervisor or your DBA.

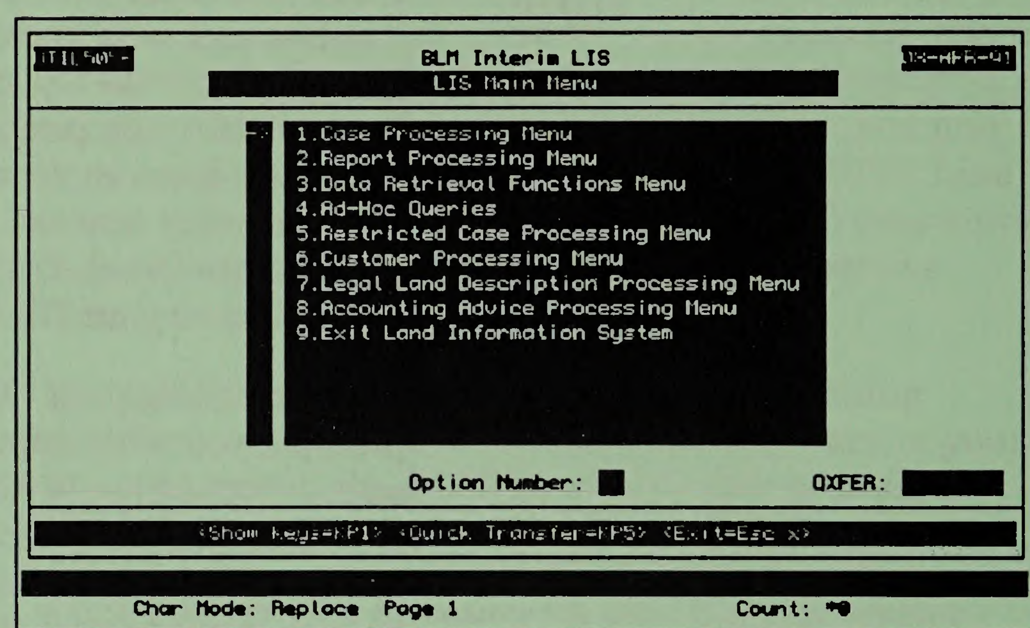
STEP 4 Once you enter your Oracle® password, the computer prompts you with `Input your terminal type e.g. (VT100)>`. At this prompt, enter the sequence of characters that identifies the terminal type you are using with the Interim System. If you enter a sequence of characters that are inappropriate for your type of terminal, the computer may return a screen (or two) full of gibberish. If this occurs, press [Ctrl]-[`P`] to escape this procedure and return to the Prime `OK,` prompt. Following is a list of the types of terminals that may access the Interim System and the sequences of characters you need to enter for each at the `Input your terminal type e.g. (VT100)>` prompt:

Type of Terminal	Entry at Prompt
PT250	`PT250L`
PC's using PT250 emulation	`PCPT250L`
PT220	`PT250L`
Pericom	`PRVT220L`

At the `Input your terminal type e.g. (VT100)>` prompt, enter the appropriate sequence of characters for your terminal type from the above list and press RETURN.

STEP 5 Once you have successfully entered your Oracle® user ID, your Oracle® password and the appropriate sequence of characters for your terminal type, you have entered the Interim System and must wait for the system to bring you to the Interim System Main Menu. If you make a mistake in entering any of these items, the system will return an error message to your terminal, and you must start over by typing **LISMENU** to access the Interim System.

The Interim System Main Menu appears as follows:



Prompt for and answer questions.

Go to Exercise B-1 (Logging onto the Prime and the Interim System).
***NOTE:** No more than a few minutes should be necessary for this brief in-class exercise.*

4.7.2 Interim System Security and How It Affects You

Briefly discuss Interim System security and how it may affect, limit, and protect course participants.

Emphasize that the greater an individual's privileges are on the System, the greater their responsibilities are for the integrity of data.

All Interim System users are assigned to a specific security level in the Interim System; this security level determines the privileges you have for using the Interim System. Your level of security is determined by your Prime user ID and/or your Oracle® user ID. Your system privileges directly control which part (and how much) of the Interim System you may access and use. The greater your privileges are on the system, the greater your responsibility is for insuring data integrity and system security.

Security levels range from those granted to the public (allowing them to view and retrieve certain land and mineral case information), to those granted to the Database Administrator. Most BLM users have been given Interim System privileges to retrieve most case information on-line from the database and to request off-line reports. Some BLM users have privileges to enter, modify and delete case data. Still others have privileges to maintain customer information, legal land description information or accounting advice data in the database.

Other than understanding that the Interim System has different levels of security that control access to the various parts of the system, you need not be concerned with security or system privileges. In using the Interim System, you will not see any indication of what privileges you have — nor will you need to. Based on your user ID, the system automatically controls your options for working within Interim System and frees you to concentrate on your land and mineral data tasks.

NOTE:
Your Interim System security level should not be confused with your Prime computer security level. While the computer may set your Interim System security level based upon your Prime user ID, the Prime's security system is separate from Interim System security. For questions regarding Prime security, see your Prime computer System Manager. For questions regarding Interim System security, see your Database Administrator.

4.8 Interim System Function Keys

30 Minutes

Briefly review each of the function keys listed in this section of the training guide.

Refer back to the terminology and concepts reviewed in 4.3 of this training guide.

NOTE: *Only a brief review is appropriate, since students are still unfamiliar with Interim System forms, fields, etc.... In addition to exposing students to this material, emphasize the essential role function keys play in using the System.*

Use the appropriate training aids, as needed, to briefly describe the purpose of each function key:
Instructor's Computer, LCD Panel and Overhead Projector, Training Wall Displays, System Map, Flipcharts, Whiteboards, Markers, Training Guide diagrams, System Documentation and Data Element Dictionary.

Prompt for and answer questions concerning each function key (or set of related keys) before moving on to discuss the next function key.

CLEAR BLOCK

The CLEAR BLOCK function key clears all records in a block, and if a query is in progress, it cancels the query. CLEAR BLOCK does not delete records from the database nor does it perform a rollback; it only removes records from view. If any records have been inserted, deleted or updated since the last commit, the Interim System displays

`Do you want to commit the changes you have made?`

If you answer `Yes`, the changes are committed to the database before the block is cleared. If you answer `No`, the changes are discarded, and the block is cleared.

CLEAR FIELD

The CLEAR FIELD function key erases characters from the cursor position to the end of the field. If the cursor is at the beginning of the field, the entire value is erased. If the cursor is somewhere in the middle of the field, you can erase the field's entire value by pressing CLEAR FIELD twice.

CLEAR FORM

The CLEAR FORM key performs one of two functions, depending on the form/page on which it is used. On some pages in multi-page forms, CLEAR FORM clears all the fields on the current page and moves the cursor to the first enterable field on the page. On other forms, CLEAR FORM performs a rollback — all the form's fields on all its pages clear, and the cursor returns to the first enterable field on the form.

CLEAR RECORD

The CLEAR RECORD key clears the fields of a record on the form. If a new record or the modifications to an existing record are cleared before they have been committed, they are discarded. It is important to remember that this key does not remove an existing record from the database.

COMMIT

The COMMIT function key saves the information you have entered into a form's field(s) in the appropriate Interim System database table(s). The COMMIT function key directly affects the data stored in the Interim System and saves new information, changes

to existing information or deletions of previously saved (i.e., committed) data. To commit data to the Interim System, certain criteria must be met — most notably, all the mandatory fields in the form must contain acceptable values before this data can be committed. Once you have pressed COMMIT, the Interim System returns a message to you regarding this commit (e.g., `Transaction Completed - x Records Processed`). The number of records processed refers to the number of records that have been affected by your use of the form.

COUNT QUERY HITS
The COUNT QUERY HITS function key counts the number of records matching the specified search criteria when used after the ENTER QUERY function key. When used alone, the COUNT QUERY HITS key counts all of the records in a table. Note that if you press this function key after pressing the EXECUTE QUERY function key, it terminates the query, clears all the records from the screen, and counts all of the records in the table that can be retrieved by the block.

CREATE RECORD
The CREATE RECORD function key allows you to add a new record, inserted after the current cursor position/record, on the page or form.

CURSOR HOME
The CURSOR HOME function key moves the cursor to the first (top left) enterable field of the current page or block.

DELETE BACKWARDS
The DELETE BACKWARDS function key deletes the character before the cursor position and moves the cursor (and all following characters) to the left. If the cursor is at the left-most position in a field, nothing happens.

DELETE CHARACTER
The DELETE CHARACTER function key deletes the character at the current cursor position and pulls the following characters to the left. The cursor's position in the field or record does not change.

DELETE RECORD
The DELETE RECORD function key deletes the current record from the Interim System database. Only previously committed records can be deleted.

When you press this key, the fields in the current record the cursor is on are cleared, displaying the next consecutive record. The DELETE RECORD key alone, however, does not delete the record. The record is deleted only when you press the COMMIT function key after pressing the DELETE RECORD key. If you press the DELETE RECORD key and attempt to exit the form without pressing the COMMIT key, the System will prompt you with, `Do you want to commit the changes you have made?`. When the record truly is deleted, it no longer exists in the database and cannot be retrieved or displayed.

DISPLAY ERROR

The DISPLAY ERROR function key displays the help screen for the field in which an error has occurred. Error information and/or advanced help information for the field is displayed along with the error message. The information regarding the error and its possible cause can be captured by the ORACLE® PRINT function key and is needed by Interim System programmers to solve the problem.

DUPLICATE FIELD

The DUPLICATE FIELD function key copies the value in the corresponding field of the preceding record to the current field (the field in which your cursor sits). You can modify the value if necessary.

DUPLICATE RECORD

The DUPLICATE RECORD function key copies all field values from the preceding record to the corresponding fields in the current record. You can modify the duplicated values, if necessary.

ENTER QUERY

The ENTER QUERY function key (used in conjunction with the EXECUTE QUERY key) alerts the System that you want it to search for and retrieve specific information. This key allows you to enter in query parameters for a database search.

When you press ENTER QUERY in a record/page, the system clears the contents of the records on the screen (if anything was in them) and waits for you to enter information to guide it in its search of the database. The data that you enter after pressing the ENTER QUERY key are called the SEARCH CRITERIA. Search criteria are the specific parameters defining which value(s) and/or records to search for and re-

trieve from the Interim System database. You must press the EXECUTE QUERY key after typing your search criteria to retrieve information.

EXECUTE QUERY

The EXECUTE QUERY function key (used in conjunction with the ENTER QUERY key) submits the search criteria you entered after pressing the ENTER QUERY key to the System for information retrieval.

The EXECUTE QUERY key simply submits a query request of all appropriate records to the Interim System database management system. The System searches the appropriate tables to retrieve the specified information. If found, this information is displayed in the field(s) on the form/page/screen you are using.

When EXECUTE QUERY is pressed (while in Query Mode) and no search criteria are specified in available parameter field(s), the System retrieves all applicable information, not just the data that would be retrieved with specific search criteria.

EXIT/CANCEL

The EXIT/CANCEL function key allows you to exit the current form. In most situations, you can exit a form at any time. On some forms, you cannot exit a form while in a block/page containing mandatory fields. In these cases, press CLEAR RECORD before pressing EXIT/CANCEL.

The EXIT/CANCEL key also cancels a query. If you press the ENTER QUERY key to enter search criteria, and then decide not to execute the query, EXIT/CANCEL tells the System that you are not going to enter criteria for a query and to resume normal functioning.

NOTE:

Unless ENTER QUERY has been pressed, EXIT/CANCEL may drop all uncommitted data and quit the form. Do not press EXIT/CANCEL to move from one page (or LOV screen) to another in a multi-page form; use other function keys for these cursor movements.

HELP TEXT

In any field on any Interim System form, the HELP TEXT function key displays a Field Description screen. This on-line help screen displays text from Interim System documentation explaining the meaning, use and function of the field in question.

INSERT/REPLACE

The INSERT/REPLACE function key in the Interim System is similar to this same function key in most word processing programs; it simply changes the way individual characters are entered into fields – it alters the Character Mode displayed at the bottom of all Interim System forms. INSERT/REPLACE toggles the insert mode to replace mode and vice versa. When insert mode is active, each character entered displaces the character at the cursor; the displaced character, the cursor, and all following characters are moved to the right. The cursor remains on the first character displaced. In replace mode, each character entered replaces the character at the cursor, and the following characters are not affected. The cursor, however, moves to the right and is positioned on the next character.

LAST SET

The LAST SET function key allows you to move to the last group of records in a list of multiple records on forms or pages that display multiple records.

LOV

The LOV (List of Values) function key temporarily moves you from a specific field on a form to a List of Values screen(s). List of Values screens provide you with a list of valid values for the associated field on the form and provide query capabilities to access allowable information for the current field from the database. The use of the ENTER QUERY and EXECUTE QUERY keys on List of Values screens is common and helps speed your search for the value(s) you need to complete a form.

MOVE LEFT

This function key moves the cursor one character to the left within a field.

MOVE RIGHT

This function key moves the cursor one character to the right within a field.

NEXT BLOCK

The NEXT BLOCK function key moves the cursor to the next block of the form if all mandatory fields in the current block contain valid information.

When NEXT BLOCK is pressed, the cursor moves to the first field of the first record in the new block. If the cursor is returned to the block during the current session, however, it may not go to the first record; instead, the cursor returns to the position of the record it was in last.

NEXT FIELD

The NEXT FIELD function key moves the cursor to the beginning of the next enterable field.

If the cursor is in the last field of a record, this function key moves the cursor to the first field. If the next field is on a different page, the proper page is displayed and the cursor is placed in the field. In certain fields the NEXT FIELD key moves the cursor to the next enterable field as determined by data entered in the field, and cursor movement may appear inconsistent with normal cursor movement.

NEXT PAGE

On multi-page forms, the NEXT PAGE function key moves the cursor to the next page if all mandatory fields on the current page contain valid information. This function is not available on all terminal types. If your terminal does not have a NEXT PAGE function key, use the NEXT BLOCK function key to achieve similar results.

NEXT RECORD

The NEXT RECORD function key displays the next record, if one exists. If a form or page displays several records at once, the NEXT RECORD function key moves the cursor down one record. When the cursor reaches the last record, the following message appears on the message line:

```
at last record
```

On Interim System Case Processing forms, the NEXT RECORD key functions as above except that when the cursor reaches the new record. After entering all mandatory fields in the new record, the NEXT RECORD key can be pressed again to create another new record, etc.... If a block displays several records at

once, the completed records move up and scroll off the screen. Always remember to save your work by committing new records to the database before exiting a form.

NEXT SET

The NEXT SET function key allows you to scroll down through the list of records in multiple record sets on forms or pages that display multiple records. When the Interim System scrolls down through a list of records a group at a time, the bottom record (or two) displayed before the scroll is displayed as the top record (or two) afterwards. In other words, you can scroll down through a long list of records a set at a time, but the System always redisplays a record (or two) so that you can keep track of your position in the list.

Use the NEXT SET key in conjunction with the PREVIOUS SET, LAST SET, NEXT RECORD and PREVIOUS RECORD function keys.

NOTE:

Multiple record scrolling is approximately 80% of visible records on most Interim System forms. Multiple record scrolling is never 100%; at least one record is redisplayed.

ON-LINE MANUAL

The ON-LINE MANUAL function key displays information on the use and function of the current form from Interim System documentation.

ON-LINE TEMPLATE

The ON-LINE TEMPLATE function key displays the Interim System keyboard map for the computer terminal you are using.

ORACLE® PRINT

The ORACLE® PRINT (Screen) function key writes current screen/form/page information to a file on the computer system and then prints the file (usually on a printer specified by your computer system manager). When you press ORACLE® PRINT, the System prompts you for specific information concerning what you want printed. When prompted for a file name,

enter a file name (plus an extension, if you wish) or press NEXT FIELD to use the default file name `FORM.LIS`.

PREVIOUS BLOCK
The PREVIOUS BLOCK function key moves the cursor to the previous block of the form if all mandatory fields in the current block contain valid information. If you want to move to the previous block without entering mandatory field data, you must first clear all information from the current block by pressing the CLEAR RECORD key, then press the PREVIOUS BLOCK key.

When PREVIOUS BLOCK is pressed, the cursor moves to the first field of the last record accessed within the previous block. If the cursor is returned to the block during the current session, however, it may not go to the first record; instead, the cursor returns to the record it was in last.

PREVIOUS FIELD
The PREVIOUS FIELD function key moves the cursor to the beginning of the previous field. If the cursor is in the first field of a record, this function key moves the cursor to the last field. If the next field is on a different page, the proper page is displayed and the cursor is placed in the field.

PREVIOUS PAGE
The PREVIOUS PAGE function key moves the cursor to the previous page if all mandatory fields on the current page contain valid information. This function is not available on all terminal types. If your terminal does not have a PREVIOUS PAGE function key, use the PREVIOUS BLOCK function key to achieve similar results.

PREVIOUS RECORD
On Interim System forms, the PREVIOUS RECORD function key displays the previous record, if one exists. If a form or page displays several records at once, the PREVIOUS RECORD function key moves the cursor up one record. When the cursor reaches the first record, the following message appears in the message line:

```
at first record
```

PREVIOUS SET

The PREVIOUS SET function key allows you to scroll up through the list of records in multiple record sets on forms or pages that display multiple records.. When the Interim System scrolls up through a list of records a group at a time, the top record (or two) displayed before the scroll is displayed as the bottom record (or two) afterwards. In other words, you can scroll up through a long list of records a set at a time, but the System always redisplays a record (or two) so that you can keep track of your position in the list.

Use the PREVIOUS SET key in conjunction with the LAST SET, NEXT SET, NEXT RECORD and PREVIOUS RECORD function keys.

REDISPLAY PAGE

The REDISPLAY PAGE function key restores the contents of the screen. Use it if your screen becomes cluttered with System messages or random characters produced by data transmission errors.

SHOW FUNCTION KEYS

The SHOW FUNCTION KEYS key displays your terminal's function key keyboard assignments.

4.9 On-line Help in the Interim System

5 Minutes

Briefly review each of the types and sources of on-line help listed in this section of the training guide.

Refer back to the terminology and concepts reviewed in 4.3 of this training guide, as well as the function keys reviewed in 4.8.

NOTE: Emphasize that the Interim System documentation is the ultimate and definitive source of help available to any user.

Prompt for and answer questions concerning each type of on-line help before moving on to discuss the next source of help.

When using Interim System forms, there may be times when you need information concerning a specific function key, a form, a field or the values that are valid for a field. Although you can look up the information in the Interim System documentation, or ask your supervisor or Database Administrator for help, you can also use several on-line help functions built into the System to find the answer. The following briefly explains the on-line help available in the Interim System.

Auto Help

On all forms throughout the Interim System, messages and instructions that help you properly use a form appear in the Legend Line, Message Line, and Status Line at the bottom of the computer screen. These messages and instructions appear automatically as you move from field-to-field and page-to-page in forms. It is important that you read and follow the information contained in these lines while you are using a form. Failure to read this information may lead you to make errors.

Help Text

In any field on any Interim System form, pressing the HELP TEXT function key causes a Field Description screen to appear. This on-line help screen displays text from Interim System documentation explaining the meaning, use and function of the field in question.

On-line Manual

Within any form in the Interim System, pressing the ON-LINE MANUAL function key displays information on the use and function of the current form from Interim System documentation. While this function is handy for occasional, light use, it is recommended that you read the appropriate sections in the Interim System User's Handbook or Reference Manual if you manual information needs are significant.

On-line Template

Anywhere within the Interim System (in forms or menus), pressing the ON-LINE TEMPLATE function key displays the Interim System keyboard map for the computer terminal you are using.

Show Function Keys

You can display your computer terminal's current key assignments by pressing the SHOW FUNCTION

KEYS function key. The list of current keyboard assignments, while listing similar information, is not the On-line Template.

List Of Values

In many fields throughout the Interim System, the letters LOV appear on the right side of the Legend Line. Whenever these letters appear in this location, you may press the LOV function key to obtain a List Of Values. The LOV (List of Values) function key temporarily moves you from a specific field on a form to a List of Values screen(s). List of Values screens usually provide you with a list of valid values for the associated field on the form. Some List of Values screens are designed specifically for you to enter search criteria for a database query. The use of the ENTER QUERY and EXECUTE QUERY keys on List of Values screens is common and helps speed your search for the value(s) you need to complete a form.

4.10 How to Exit an Interim System Session if Your Terminal "Locks Up"

5 Minutes

Briefly review what a "lock-up" is and the step-by-step exit procedures outlined in this section of the training guide.

Emphasize the importance of patience, and the detrimental (and potentially disastrous) effects of repeatedly pressing keys out of frustration and impatience.

Prompt for and answer questions concerning each step before moving on to discuss the next step.

Although it is uncommon for a form to completely lock up when you are using it, the following information will help you exit a form and/or the System if such a total freeze-up occurs.

NOTE:
If the Interim System Oracle® Database or the Prime Computer goes down while you are using an Interim System form, your terminal will lock up. If the Prime or Oracle® go down, notify your supervisor or DBA. You must wait for these systems to come back on-line before you can continue working in the Interim System.

If your terminal appears to lock up while you are in a form and you are certain that no error was made in using the form and that Oracle® and the Prime are up and running, the first thing to do is wait. Sometimes, because of heavy use, the System's response time is slow.

WARNING:

!

Never press a key (e.g., NEXT FIELD, EXIT/CANCEL, EXECUTE QUERY) more than once if the System seems slow or unresponsive. Your keyboard will eventually send extra keystrokes to the computer, and probably wreck havoc in your use of a form. Patience can save you much confusion and having to do work over again.

If you are certain that you made no error in using the form and have waited (at least five minutes) for the computer to return you to your process, perform the following steps one at a time. Do not go on to the next step until you are certain the previous step did not work in exiting you from the System.

STEP 1 Press the EXIT/CANCEL function key if you have not already done so. This will return you to the menu from which you accessed the form you are (were) using.

STEP 2 Press [CTRL]-[P]. This is the Prime operating system (PRIMOS) key sequence that tells the computer to quit the current process running under your user login. [CTRL]-[P] may be pressed two or three times, although this is normally not necessary. After pressing [CTRL]-[P] wait two minutes before going on to Step 3.

STEP 3 Press and hold down the [ALT] key, then press the BREAK key three times (on personal computers, hold down the [ALT] key and press B three times). This sequence can be repeated several times, but this is normally not necessary. This sequence of keystrokes disconnects you from the Prime computer. Once you have broken out of the Interim System with this step you must login again on the Prime.

NOTE:

If you disconnect from the Prime and log back in it will help System performance if you log out your previous process. Ask someone familiar with PRIMOS for assistance if you do not know how to log out a previously run process.

STEP 4 If the above three steps have failed, and you have allowed adequate time for the System to respond, turn your terminal off. Wait approximately 30 seconds, and turn the terminal back on. Login again using your Prime User ID, etc.... If the System still will not respond, contact your supervisor or the DBA.

5. Data Retrieval Menu-by-menu, Form-by-form

10 Minutes

Introduce the Menu-by-menu, Form-by-form module, its purpose and its organization into sections and subsections.

Prompt for and answer questions concerning each type of section in this module (Purpose, Navigation, Workflow, etc...) before moving on to discuss the next type of section.

Purpose of this module of the course:

The purpose of this training module of the Interim System Case Processing course is to present the purpose and intended use of each form and submenu in Case Processing. Also included is an overview of the purpose and intended use of forms in Customer Processing commonly used by BLM Case Processing personnel. This module also provides an overview of the types of land and mineral recordation data addressed on each Case Processing form.

NOTE:

While the utility of each submenu and form is reviewed (along with a brief look at each form's fields), this module is not meant to present an in-depth look at each and every field.

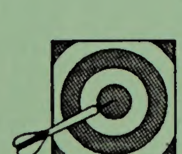
Please see the Interim System documentation for a more thorough discussion of each field and the land and mineral information for which each is designed.

Organization of this course module:

Use the appropriate training aids, as needed, for each menu and form section: Instructor/Student Computers, Keyboard Templates, LCD Panel and Overhead Projector, Training Database, Training Wall Displays, System Map, Flipcharts, Whiteboards, Markers, Training Guide, System Documentation and Data Element Dictionary.

This module of the Case Processing Training Guide is divided into numerous sections, one for each submenu and form in Case Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose**, **Navigation**, **Required Data**, **Structure**, **Workflow**, and **Quirks**.

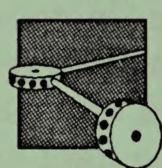
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs that describe the contents of each subsection.



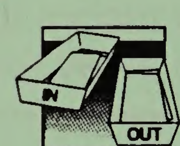
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete, or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data the Structure subsection lists them. This subsection may also discuss whether a form (or page in a form) is divided into several blocks of fields, and whether these separate blocks address different categories of data. This subsection may also mention whether a certain page of a multi-page form is optional.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

NOTE:
In the sections of a few forms in this module, there are two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Data Retrieval Functions Menu

5 Minutes

Discuss navigation to the data Retrieval functions Menu from the Main Menu.

Review the general purpose of each menu option. Refer to the Data Retrieval Functions portion of the System Map.

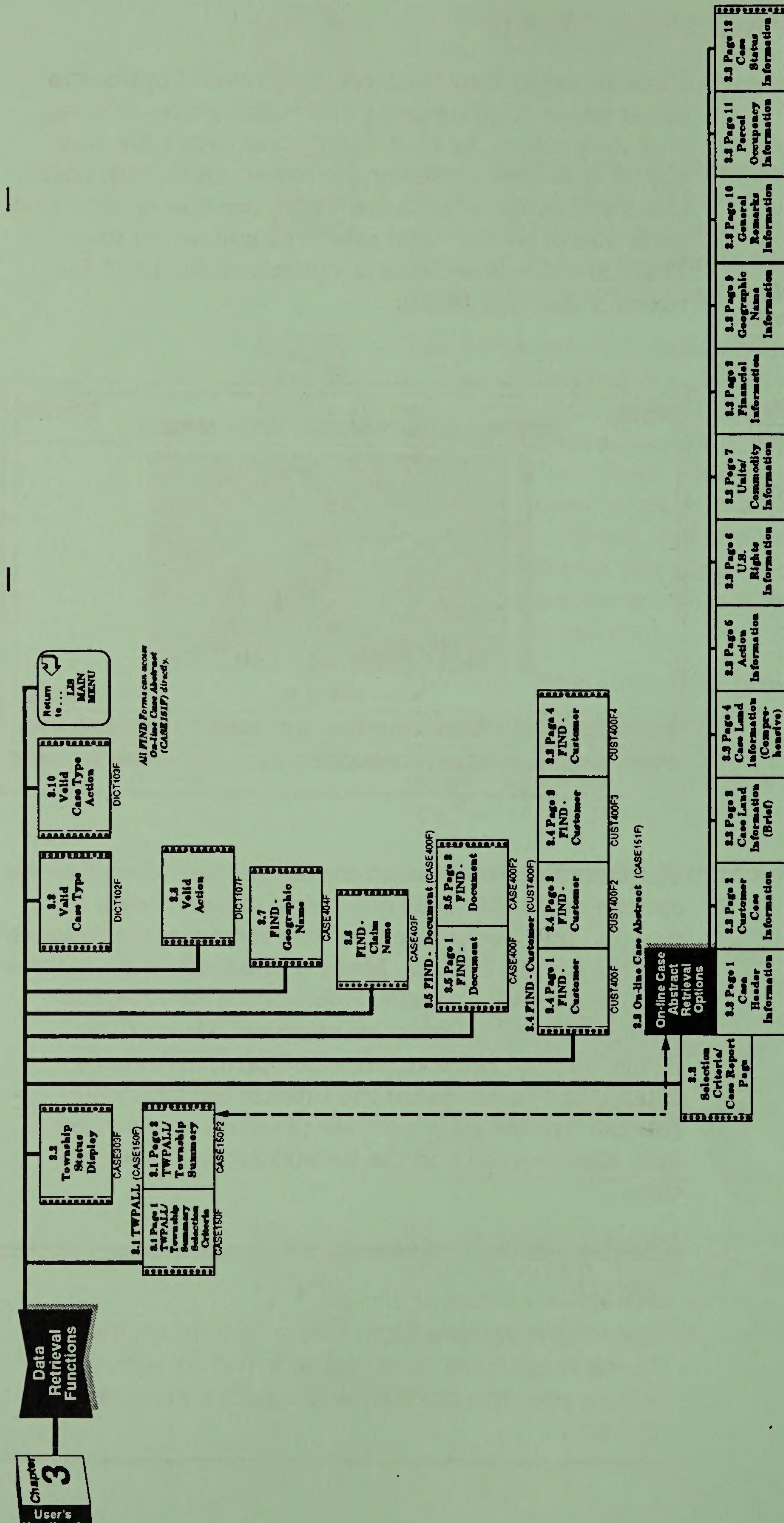
Demonstrate option selection procedures (including QXFER).

Prompt and answer questions.

Data Retrieval Functions contains several options to assist you in locating cases and viewing case and case land information by land description, case type, case status, case serial number, customer, document, claim name and geographic name. There are also options that allow you to review valid case type and action data. There are eleven sections or options on the Data Retrieval Functions Menu:

The Data Retrieval Functions Menu itself identifies the options available. Each menu option has its own function and purpose within the Data Retrieval environment and the overall System. Many of the options are interrelated and provide parallel information for case, customer and land information retrieval. Using these forms, you can retrieve, view and print all data in established cases within the Interim System. This Interim System training class presents an overview of each menu option and the form(s) accessible within them.

NOTE:
The Interim System Main Menu option returns you to the menu one level higher in the System, from which you can access other options in the Interim System.


Chapter 3
User's Handbook
Data Retrieval Functions
3.2 Township Status Display
CASE303F
3.1 TWPALL (CASE150F)
3.1 Page 1 TWPALL/ Township Summary Selection Criteria
CASE150F
3.1 Page 2 TWPALL/ Township Summary
CASE150F2
3.9 Valid Case Type
DICT102F
3.10 Valid Case Type Action
DICT103F
Return to . . . LIS MAIN MENU
All FIND Forms can access On-line Case Abstract (CASE151F) directly.
3.8 Valid Action
DICT107F
3.7 FIND - Geographic Name
CASE404F
3.6 FIND - Claim Name
CASE403F
3.5 FIND - Document (CASE400F)
3.5 Page 1 FIND - Document
CASE400F
3.5 Page 2 FIND - Document
CASE400F2
3.4 FIND - Customer (CUST400F)
3.4 Page 1 FIND - Customer
CUST400F
3.4 Page 2 FIND - Customer
CUST400F2
3.4 Page 3 FIND - Customer
CUST400F3
3.4 Page 4 FIND - Customer
CUST400F4
3.3 On-line Case Abstract (CASE151F)
On-line Case Abstract Retrieval Options
3.3 Selection Criteria/ Case Report Page
3.3 Page 1 Case Header Information
CASE151F
3.3 Page 2 Customer Case Information
CASE151F2
3.3 Page 3 Case Land Information (Brief)
CASE151F3
3.3 Page 4 Case Land Information (Comprehensive)
CASE151F4
3.3 Page 5 Action Information
CASE151F5
3.3 Page 6 U.S. Rights Information
CASE151F6
3.3 Page 7 Units/ Commodity Information
CASE151F7
3.3 Page 8 Financial Information
CASE151F8
3.3 Page 9 Geographic Name Information
CASE151F9
3.3 Page 10 General Remarks Information
CASE151F10
3.3 Page 11 Parcel Occupancy Information
CASE151F11
3.3 Page 12 Case Status Information
CASE151F12

TWPALL/Township Summary Form (CASE150F)

1 1/2 hours (including Exercise B-2)

Review the purpose of the TWPALL form. Emphasize its similarity to the AALRS TW-PALL function.

Purpose and use of the TWPALL/Township Summary Form:

This form allows you to search, view and print township summary and/or survey summary data on-line, off-line and through a screen display option. Based upon a set of database query selection criteria entered on the form, case land descriptions and related data are retrieved and displayed and/or printed.

For each case land record retrieved within a specified township or survey, this form displays detailed land description data, as well as the serial number, case status and case type of the case containing the land record. Land description information displayed on this form includes: land number within the case, parcel code (only for Alaska Native Allotment case lands), section number, aliquot part, survey type/number, tract, block, lot, case land acres, meridian code, township and range designations, case land status code, date and description of the last action related to the case land, administrative agency, document type/number recorded in the last action related to the case land, county/borough, BLM district office and resource area, native region and right-of-way width.

Review who uses this form and why.

BLM personnel responsible for retrieving case land description information on-line in the Interim System's TWPALL format use this form to perform their task.

Describe the interconnection among Data Retrieval Forms and the advantages this provides users. Refer to the System Map.

NOTE:
This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any displayed case land description and retrieve all the information stored in the System for the case containing the case land record.

Review navigation to this form (including QXFER).

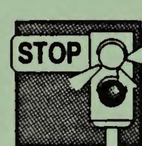
Navigation to this form and use of CASE150F program name in QXFER:

The TWPALL/Township Summary Form (CASE150F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and

then the TWPALL/Township Summary option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE150F program name.

Again, emphasize the interconnection among Data Retrieval forms.

NOTE:
The TWPALL/Township Summary Form can be accessed directly from the Township Status Display Form (CASE303F).

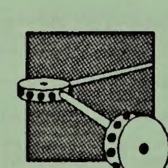


Discuss data required to use this form.

Required Data you must have to use this form:

- Meridian, Township and Range or Survey Type
- A decision to View, Print, Count Pages or Screen Display retrieved data

NOTE:
If you choose to print retrieved data, you must decide whether to have the TWPALL output written to a file or printed on a printer. If you choose to have the output printed, you must provide the printer's ID. You must decide whether to place the TWPALL output job in the Express queue or the Nite queue on the Prime Computer.

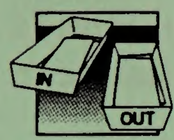


Review this form's basic structure and the types of data that can be entered, retrieved and viewed.

Structure of form:

The TWPALL/Township Summary Form consists of two pages. Page 1 contains fields that allow you to enter selection criteria for the TWPALL database search.

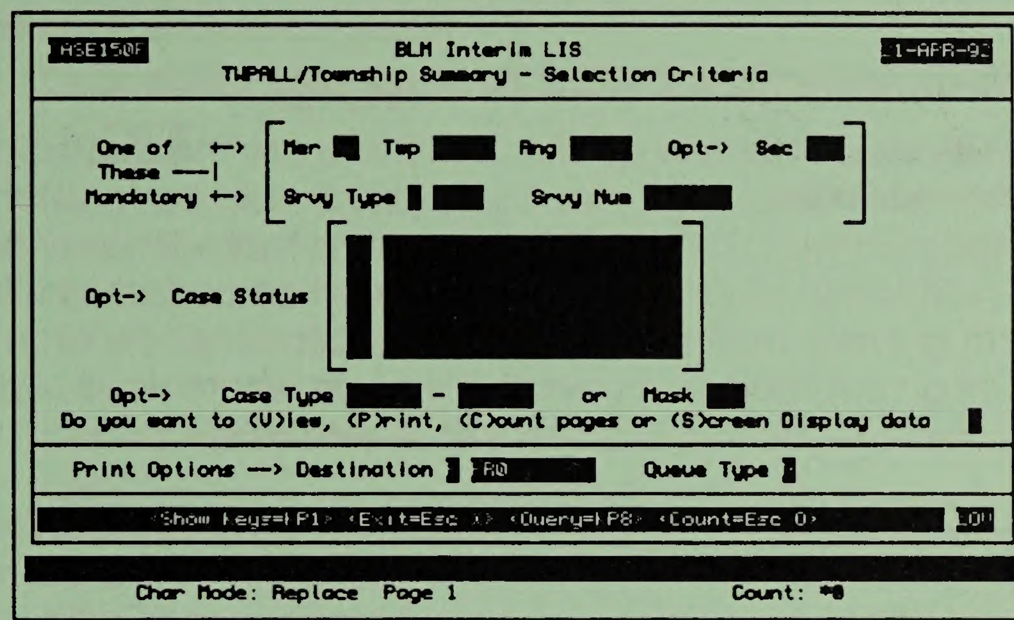
Page 2 contains two blocks of fields. The bottom block of fields displays multiple case land records retrieved from the database. The cursor appears in the left-most field of the bottom block (along with a pointing arrow), and its position on one of the retrieved case land records indicates which of these is current. The top block of fields on page 2 contains case land, case and action information specific to the current case land record identified by the cursor and arrow in the bottom block.



Workflow within this form and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the TWPALL form.

Use the available training aids as needed.



STEP 1

Review the concept of specifying selection criteria for querying the database.

Discuss selection criteria choices as well as mandatory and optional fields.

Discuss Meridian Codes as well as the structure and format of the five-character Township and Range fields.

Demonstrate and discuss LOV where available.

Discuss what is and is not validated in the Township and Range fields.

In specifying TWPALL/Township Summary selection criteria, you are required to enter, at a minimum, either a meridian code, township designation and range designation or a survey type code.

If you do not want to select a meridian-township-range, press NEXT FIELD in the blank Meridian field and skip to the Survey Type field.

If you want to specify a meridian-township-range for the database query, enter a meridian code, a five-character township designation and a five-character range designation. The Section field is optional once meridian, township and range values are specified. Use the List of Values (LOV) for the Meridian field, if necessary. See the Interim documentation for a detailed description of the five-character township and range designations.

The meridian code and the direction values (`N`, `S`, `E` or `W`) of the township and range designations you enter are verified immediately when you press NEXT FIELD, but the form only checks whether you enter numbers, instead of other characters, in the first four characters of the Township and Range fields. It is your responsibility to enter valid township and range numbers and fractional codes for the specified meridian. If you specify a section number, the meridian-township-range-section combination is verified using

the System's legal land description information, and only valid MTRS combinations can be entered for this form.

Briefly discuss the three special Meridian Codes.

NOTE:

There are three special meridian codes of which you should be familiar. Meridian code 00 specifies cases that will never have land descriptions. Meridian code 98 indicates invalid land descriptions. Meridian code 99 identifies lands in cases where valid Legal Land Description data does not yet exist but will in the future.

For all three special meridian codes, the value 00000 is entered automatically in both the Township and Range fields. This is the value normally stored in the database for township and range designations for case lands having meridian codes 00 or 99. This value may (or may not) match the township and range designations stored in the database for case lands having meridian code 98, so you may wish to replace 00000 with the appropriate values.

When using meridian codes 00 or 99, it is not necessary to enter data in the Section field. When using meridian code 98, a section number may be appropriate only if you replace the 00000 values in the Township and Range fields.

STEP 2

If you do not enter a meridian, township and range, the Survey Type field is mandatory, otherwise it is an optional field that further limits the TWPALL database query to those case land records having the specified survey type. The Survey Number field is optional once a survey type is specified.

If you neither need nor want to specify survey information for the selection criteria, press NEXT FIELD in the blank Survey Type field and skip to the Case Status field.

To specify survey information for the query selection criteria, enter the survey type code; use the List of Values (LOV), if necessary. Enter the optional survey number, if desired. When you press NEXT FIELD in

the Survey Number field, the cursor skips the Case Status field and moves to the first Case Type field; to move back to the Case Status field, press PREVIOUS FIELD.

Briefly review the difference in right justification between survey numbers ending in numbers and letters.

NOTE:
Survey numbers automatically right-justify and zero-fill when you press NEXT FIELD. Survey numbers ending in numbers (**0** - **9**) right-justify to fill the first six positions of the Survey Number field, leaving the seventh position blank. Survey numbers ending in letters right-justify to fill the entire Survey Number field.

STEP 3

Explain how case status is set automatically by actions.

Emphasize how selection criteria help to limit the scope of a database query.

The optional Case Status field allows you to enter up to five case status codes that limit the TWPALL database query to those case land records having the specified case status(es). Case Status is set by certain action codes. Enter case status code(s), if desired; use the List of Values (LOV), if necessary. Press NEXT FIELD on a blank or the last Case Status field to move to the first Case Type field.

The two Case Type fields are optional and allow you to further limit the TWPALL database query to those case land records within a single case type or within a range of case types.

Briefly explain what a mask is.

NOTE:
Do not use the Case Type fields if you wish to specify a Mask code in the selection criteria.

Enter the case type code(s) for a single case type or the lower- and upper-limit case type codes of a range, if desired; use the List of Values (LOV), if necessary. The second field defaults to the first field's value. Accept the default to specify a single case type, and replace it with a case type code upper-limit to specify a range. When you specify a case type(s), the Mask field is skipped automatically.

The Mask field is optional and allows you to further limit the TWPALL database query to those case land records within a group of case types represented by a mask code. Enter the mask code, if desired; use the List of Values (LOV), if necessary.

STEP 4

The (V)iew, (P)rint, (C)ount pages or (S)creen Display field is used to specify the type of action you are taking within the TWPALL form. The field defaults to V to view page 2 of the form.

Thoroughly review and demonstrate the View, Print, Count Pages and Screen Display options.

(V) allows you to view the case land records retrieved by the TWPALL database query in the fields on page 2 of this form. (P)rint, (C)ount pages and (S)creen Display all refer to the 80-column TWPALL report that can be generated with this form. P allows you to either write the retrieved data to a computer file or output the TWPALL report to a printer. C returns a count of the number of printed pages that would be generated for the report using the entered selection criteria. S allows you to display the TWPALL report on your computer screen.

If no records are retrieved by the database query, no case lands in the System meet your selection criteria. To alter these criteria, use PREVIOUS FIELD to move back through the fields on page 1 and change values as needed. To clear the form of all previously entered criteria, press CLEAR PAGE.

Enter V to view the retrieved data in the fields on page 2, and press NEXT FIELD to move into the first record of land descriptions on page 2 matching your selection criteria.

Explain the use of Q to abort the building and page counting of a report.

Explain that the screen display and off-line TWPALL reports are identical.

Review the examples of a screen display and report in this section of the Training Guide

Enter C and press NEXT FIELD to have the form display the number of pages that would be generated in an 80-column TWPALL report using your specified selection criteria. The computer screen clears and the number of pages is tallied as the System builds the report. To abort the page count and construction of a report, press Q. After the final count is displayed, you have the option to print, screen display or quit (i.e., return) to page 1 of the form.

Enter S and press NEXT FIELD to display the 80-column TWPALL report generated using your selection criteria. The TWPALL/Township Summary form clears from your computer screen, and the report begins to scroll onto it; scrolling stops when the com-

Example of TWPALL Screen Display

```
ADM-STATE:  AK                  TWPALL/TOWNSHIP SUMMARY                    PAGE 1
MER: 13 FAIRBANKS    MER            Twp: 0010S  Rng: 0030W
RA:                           BOR:
   SERIAL        MER  TWP    RNG     CASETYPE                         STATUS    ANCSA
 NUM  P LD STAT  NR   US RIGHTS  SEC ALIQ PARTS SURVEY     TR BK LT             ACRES
DOC TYPE      DOC NUM
AKF    035229   13    1S       3W   282101/FED AID HIGHWAY(SEC 10 AUTHORIZED  0
00001   AI       11              14 N2NW                                      3.0280


AKFF   043184   13    1S       3W   007500/MISC NON-COUNT         CLOSED       0
00001   RJ       11               9 N2NESESE                                   5.0000
AKFF   057295   13    1S       3W   384101/MC- LODE CLAIM         RECORDED     0
00001            11              13 SW                                          .0000
00002            11              14 SE                                          .0000
AKFF   057296   13    1S       3W   384201/MC- PLACER CLAIM       RECORDED     0
00001            11              13 NW                                          .0000
00002            11              14 NE                                          .0000
AKFF   057297   13    1S       3W   384201/MC- PLACER CLAIM       RECORDED     0
00001            11              13 SW                                          .0000
AKFF   057298   13    1S       3W   384201/MC- PLACER CLAIM       RECORDED     0
00001            11              13 S2                                          .0000
AKFF   057299   13    1S       3W   384201/MC- PLACER CLAIM       RECORDED     0
00001            11              13 W2                                          .0000
AKFF   057709SM 13    1S       3W   380901/SURFACE MGT MINING AK  PENDING      0
00001            11              13 S2W2                                        .0000
AKFF   057710   13    1S       3W   384101/MC- LODE CLAIM         RECORDED     0
00001            11              13 W2                                          .0000
.
.
.

ADM-STATE:  AK                  TWPALL/TOWNSHIP SUMMARY                    PAGE 2
Mer: 13 FAIRBANKS    MER            Twp: 0010S  Rng: 0030W
RA:                           BOR:
   SERIAL        MER  TWP    RNG     CASETYPE                         STATUS    ANCSA
 NUM  P LD STAT  NR   US RIGHTS  SEC ALIQ PARTS SURVEY     TR BK LT             ACRES
DOC TYPE      DOC NUM
AKF    059685   13    1S       3W   384201/MC- PLACER CLAIM       RECORDED     0
00003            11                1 SESESE      M 002488                       .0000
AKF    059689   13    1S       3W   384201/MC- PLACER CLAIM       CLOSED       0
00001   NV       11               1 SW                                          .0000
00002   NV       11              12 NW                                          .0000
AKF    079339   13    1S       3W   265204/CIRI-GSA POOL          CLOSED       7
00001   CV       11 754          16 E2SWSWNW                                   5.0000
00003   CV       11 754          16 NENWNWSW                                   2.5000
00002   CV       11 754          16 W2SESWNW                                   5.0000

                                                    AUTHORIZED:                5.0000
                                                CONVEYED TOTAL:               12.5000
                                              REJECTED/REVOKED:                5.0000

   *** END of CASE150R ***
```

TWPALL Report - Off-line

```
CASE150R                  BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:  ALASKA                  TWPALL/TOWNSHIP SUMMARY
Mer: 13 FAIRBANKS   MER             Twp: 0010S  Rng: 0030W

RA:                         BOR:                      NAT REG:
   SERIAL        MER  TWP    RNG    CASETYPE                     STATUS   ANCSA
 NUM  P LD STAT  NR  US RIGHTS  SEC ALIQ PARTS SURVEY    TR BK LT          ACRES
DOC TYPE      DOC NUM
AKF     035229   13    1S       3W   282101/FED AID HIGHWAY(SEC 10 AUTHORIZED  0
00001    AI      11                14 N2NW                                3.0200
AKFF    043104   13    1S       3W   007500/MISC NON-COUNT           CLOSED     0
00001    RJ      11                 9 N2NESESE                            5.0000
AKFF    057295   13    1S       3W   384101/MC- LODE CLAIM           RECORDED   0
00001            11                13 SW                                   .0000
00002            11                14 SE                                   .0000
AKFF    057296   13    1S       3W   384201/MC- PLACER CLAIM         RECORDED   0
00001            11                13 NW                                   .0000
00002            11                14 NE                                   .0000
AKFF    057297   13    1S       3W   384201/MC- PLACER CLAIM         RECORDED   0
00001            11                13 SW                                   .0000
AKFF    057298   13    1S       3W   384201/MC- PLACER CLAIM         RECORDED   0
00001            11                13 S2                                   .0000
.
.
.

CASE150R                  BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:  AK                  TWPALL/TOWNSHIP SUMMARY                  PAGE 2
Mer: 13 FAIRBANKS   MER             Twp: 0010S  Rng: 0030W
RA:                       BOR:
AKF     059685   13    1S       3W   384201/MC- PLACER CLAIM         RECORDED   0
00003            11                 1 SESESE     M 002488                  .0000
AKF     059689   13    1S       3W   384201/MC- PLACER CLAIM         CLOSED     0
00001    NV      11                 1 SW                                   .0000
00002    NV      11                12 NW                                   .0000
AKF     079339   13    1S       3W   265204/CIRI-GSA POOL            CLOSED     7
00001    CV      11 754            16 E2SWSWNW                            5.0000
00003    CV      11 754            16 NENWNWSW                            2.5000
00002    CV      11 754            16 W2SESWNW                            5.0000

                                              AUTHORIZED:         5.0000
                                         CONVEYED TOTAL:        12.5000
                                      REJECTED/REVOKED:          5.0000

   *** END of CASE150R ***
```

Explain the use of Q to exit a screen display.

puter screen is full. To display the next screen-full of the report, press NEXT FIELD. To exit a screen display before its completion, enter **Q** and press NEXT FIELD. When a screen display completes, press NEXT FIELD to return to the (V)iew, (P)rint, (C)ount pages or (S)creen Display field on page 1 of the form.

Enter P and press NEXT FIELD to either write the 80-column TWPALL report generated using your selection criteria to a computer file or print the report on a printer. The cursor moves to the first Destination field.

STEP 5

The two Destination fields allow you to specify where and how you want the TWPALL report information placed.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a **P** or an **F** in the first Destination field; the letter **P** indicates that you want an 80-column printout of the TWPALL report, and the letter **F** indicates that you want the information written to a computer file with no hardcopy output.

Explain how to chose a printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. If you are printing, enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the TWPALL report will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the TWPALL report request will be processed and its priority within the System.

The Express queue writes or prints the TWPALL report as soon as possible. The Nite queue places the TWPALL report request in a batch queue for writing the file or printing the report after office hours, as specified by the Database Administrator.

WARNING:

!

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express Queue.

When you press COMMIT with **E** in the Queue Type field, the System generates the TWPALL report immediately through a batch queue. You cannot cancel the TWPALL report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue (e.g., a job that is scheduled to run after office hours), you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the TWPALL report request to the Express queue, you may receive a message similar to the following on your terminal:

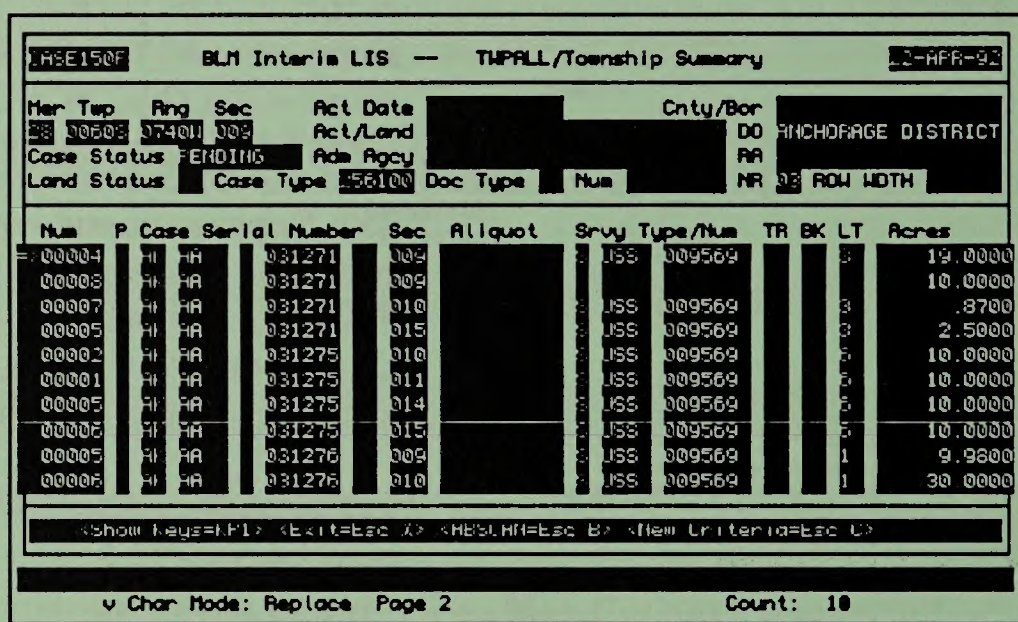
```
•••BATCH_SERVICE (user78 on ZEUS) at 15:07

Job CASE150R.101721.CPL for RUREDI
(#10821) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the TWPALL report has been either printed out or written to a file (depending on the destination you chose on this form). If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the TWPALL report written to a file, check your office procedures for accessing and printing TWPALL report files.



STEP 6

Review the structure of Page 2 and briefly review the data elements in the lower block.

Explain that land records are displayed in Case Serial Number order and then by MTRS within a case.

Page 2 of the TWPALL/Township Summary Form (CASE150F) contains two blocks of fields. The bottom block of fields displays multiple case land records retrieved during the database query. Case land records meeting your selection criteria are displayed according to case serial number and then by meridian, township range and section. For each case land record retrieved by the TWPALL query, the bottom block displays the following data: land number, parcel code, case serial number, section, aliquot part, survey type and number, tract, block, lot and case land acres. The cursor appears on one of these records in the left-most

Explain that the arrow indicates the current record.

field of the bottom block along with an arrow (=>). The position of the cursor and arrow indicates which of these records is current.

Describe the automatic assignment of land numbers within a case.

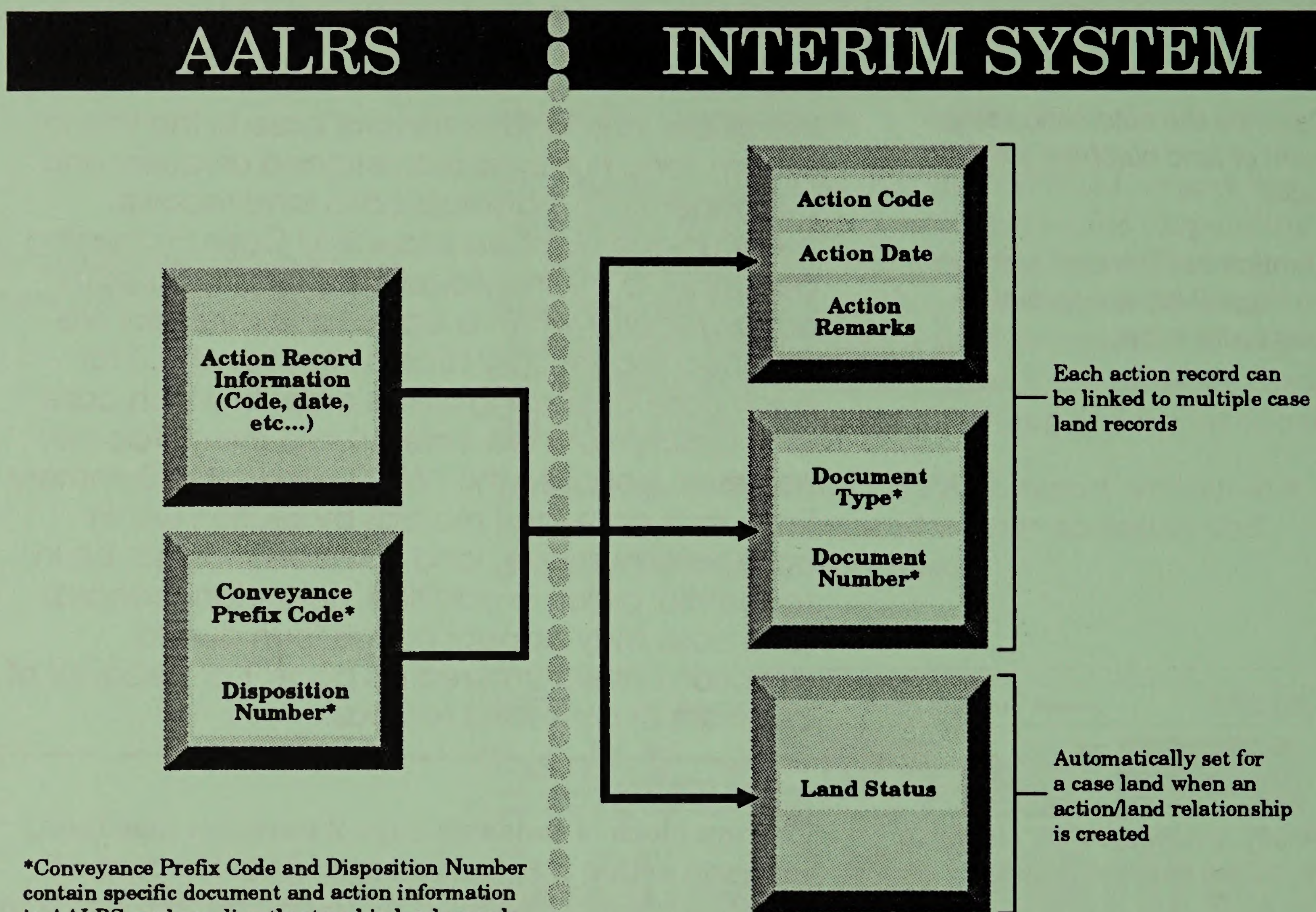
Mention that the land numbers on Page 2 will not appear in sequential order.

NOTE:

Within any one land or mineral case in the Interim System, land numbers are assigned uniquely and permanently to individual case land records. These unique numbers allow BLM Case Processing personnel to link individual case land records to action records within a case. Land numbers are assigned sequentially (00001, 00002, etc...) for each case according to the order in which case land descriptions are entered into the database; however, because the TWPALL/Township Summary Form sorts case land records by section within case serial numbers, land numbers may not be in sequential order. In addition, not all land records for a case may appear on this form due to selection criteria entered on page 1 or because of deletions of case land records.

Briefly review the data elements in the top block of Page 2.

The top block of fields on page 2 contains case land, case and action information specific to the current case land record identified by the cursor and arrow in the bottom block. For the current case land record, the top block displays the following data: meridian, township, range, section, case status, land status, action date (of the latest action linked to the case land record), action/land (i.e., the description of the latest action linked to the case land), administrative agency, case type, document type and number (stored in the latest action linked to the case land), county/borough, district office resource area, native region and right-of-way width. You may not access the fields in the top block of this page. The data in these fields simply provide additional information about the current case land record identified in the bottom block.



*Conveyance Prefix Code and Disposition Number contain specific document and action information in AALRS, and are directly stored in land records (e.g., RJ and date for Rejected Lands in a case and the rejection's date).

* Document Type and Document Number can be stored within each Action Record in the Interim System

Briefly compare and contrast the use of AALRS conveyance prefix, disposition number and action data with Interim System land status, document type/ number and action codes and dates. Refer to the AALRS-Interim System Land Status Comparison diagram and use flipcharts, whiteboards and markers, if needed.

Discuss action/land relationships in cases, emphasizing the importance of land and action numbers in such relationships.

Explain how action/land ties automatically set land status and the essential role these ties play in accurately tracking the status of individual parcels of land.

ACTION/LAND RELATIONSHIPS

LAND NUMBERS

ACTION NUMBERS	00001	00002	00003	00004	00005
001	✓	✓	✓	✓	✓
002	✓	✓	✓		✓
003		✓		✓	✓
004	✓	✓	✓	✓	
005		✓	✓		✓
006	✓		✓		
007					
008		✓		✓	✓
009	✓			✓	

Explain that if no action is tied to a land record then no action data appears in the top block of page 2 when that land record is current.

NOTE:
Action data are displayed in the top block of fields on page 2 only if the current case land has been linked with a specific action in the case. Individual case lands and individual actions are linked together within a case by BLM Case Processing personnel responsible for the entry and/or update of case information in the System.

STEP 7 Using page 2 of the TWPALL/Township Summary Form, you can scroll up and down through the retrieved case land records, enter and execute query parameters to selectively display a subset of case land

records retrieved by the initial TWPALL database query, directly access the On-line Case Abstract Form (CASE151F), return to the (V)iew, (P)rint, (C)ount pages or (S)creen Display field on page 1 to print, count pages on or screen display the 80-column TW-PALL report, or return to page 1 of the form to enter new selection criteria.

Mention that LAST SET is available on this form.

To scroll through the retrieved case land records, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to move the cursor and pointing arrow up and down the list of records. You may also use LAST SET to move the cursor and arrow to the last set of case land records. As you move the cursor and arrow from one case land record to the next, you change the current case land record, and the information in the top block of fields changes correspondingly.

Discuss and demonstrate entering and executing queries in the lower block of Page 2.

To enter and execute queries to display a subset of case land records retrieved by the TWPALL database query, press ENTER QUERY. The bottom block of fields clears. Enter the desired query parameters in the fields of the first case land record in the bottom block and press EXECUTE QUERY. Case land records meeting your selective query parameters are displayed. To redisplay the full set of case land records retrieved by the initial TWPALL query, enter and execute a query without specifying any selection parameters.

Discuss and demonstrate how to access and return from the On-Line Case Abstract form.

To access the On-line Case Abstract Form (CASE151F), select a particular case land record by moving the cursor and arrow to that record in the bottom block of the TWPALL form, and press NEXT BLOCK. The System carries forward the case serial number displayed in the TWPALL case land record onto the On-line Case Abstract Retrieval Options Page. The On-line Case Abstract Form can be used to view detailed information concerning this particular case. Refer to training materials and the Interim System documentation for instructions on how to use the On-line Case Abstract Form. To exit the On-line Case Abstract Form and return to page 2 of the TW-PALL/Township Summary Form, press EXIT on the On-line Case Abstract Form.

Discuss how to return to Page 1 to Print, Count Pages, obtain a Screen Display or enter new selection criteria.

To return to the (V)iew, (P)rint, (C)ount pages or (S)creen Display field on page 1 to print, count pages on or screen display the 80-column TWPALL report, press ORACLE PRINT.

To move back to page 1 of this form and re-enter TWPALL selection criteria, press the CLEAR PAGE function key.

Review the Quirks subsection with the class point by point and briefly summarize the use of the TWPALL form.

Quirks and special data issues for CASE150F:

- In specifying TWPALL/Township Summary selection criteria, you are required to enter, at a minimum, either a meridian code, township designation and range designation or a survey type code.
- If no records are retrieved by the database query, no case land records in the Interim System meet your selection criteria. To alter these criteria, use PREVIOUS FIELD to move back through the fields on page 1 of the form and change, delete and add values as needed. To clear the form of all previously entered criteria, press CLEAR PAGE.
- When you press NEXT FIELD and COMMIT with E in the Queue Type field on page 1 of this form, the System generates a TWPALL report immediately through a batch queue. You cannot cancel the TWPALL report without logging out the user and batch user on the Prime.
- As you move the cursor and arrow from one case land record to the next on page 2 of the form, you change the current case land record, and the information in the top block of fields changes correspondingly.
- You may enter and execute queries on page 2 to selectively display case land records retrieved by the initial TWPALL database query. This process simply allows you to select and display a subset of the case land records retrieved during the TWPALL database query initiated on page 1 (the Selection Criteria page).
- This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case land record displayed on page 2 and retrieve all the case information for a case serial number associated with that case land record.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise B-2** (TWPALL/ Township Summary)*

- Within any one land or mineral case in the Interim System, land numbers are assigned uniquely and permanently to individual case land records. These unique numbers allow BLM Case Processing personnel to link individual case land records to action records within a case. Land numbers are assigned sequentially (00001, 00002, etc...) for each case according to the order in which case land descriptions are entered into the database; however, because the TWPALL/Township Summary Form sorts case land records by section within case serial numbers, land numbers may not be in sequential order. In addition, not all land records for a case may appear on this form due to selection criteria entered on page 1 or because of deletions of case land records.

- Action information is displayed in the top block of fields on page 2 of the form only if the current case land record has been linked with a specific action record in the case. Individual case lands and individual actions are linked together within a case by BLM Case Processing personnel responsible for the entry and/or update of case information in the System.

Township Status Display Form (CASE303F)

20 minutes

Review the purpose of the Township Status Display form, specifying the types of data retrieved and displayed.

Purpose and use of the Township Status Display Form:

The Township Status Display Form (CASE303F) queries the database to produce an on-line display and/or off-line 80-column report of the number of cases that contain case land records within each section of a specified township. The form allows you to enter selection criteria for the database query to specify the township, limit the display/report to a case type or mask, and optionally limit the display/report to a specific case status.

The Township Status Display contains the following data:

- For each section in the specified township, the number of cases meeting the selection criteria that have case lands in the section.

- For the township as a whole, the number of cases meeting the selection criteria that have case lands somewhere within the township, but not coded to any specific section.

- For the township as a whole, the total number of cases meeting the selection criteria that have case lands within the township.

Explain how single cases can be connected more than once in various counts on the form. Emphasize that cases are counted only once for the township case total.

NOTE:

A single case may be counted more than once in the individual section counts, since a case may contain lands in more than one section within the township. Similarly, cases in the township that contain lands coded to a section(s) and lands not coded to any specific section are counted more than once. The township case total, however, counts all cases containing lands within the township only once.

The off-line report contains the same information displayed on-screen.

Review who uses this form and why.

BLM personnel responsible for retrieving information concerning the number of cases that have case lands within each section of a township and/or within the township as a whole use this form to perform their task.

Describe the interconnection among data retrieval forms. Refer to the System Map.

NOTE:

This form allows you to access the TWPALL/ Township Summary Form (CASE150F) directly and retrieve more detailed case land information that meets the selection criteria entered on the Township Display Form (CASE303F).

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE303F program name in QXFER:

The Township Status Display form (CASE303F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the Township Status Display option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE303F program name.

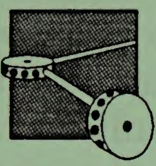
Discuss the data required for this form.

Required Data you must have to use this form:

- Meridian, Township and Range
- Case Type or Mask code
- A decision to display Township Status data on-line (i.e., on this form) or to print this data off-line

NOTE:

If you choose to print a Township Status Display report, you must decide whether to have the Township Status output written to a file or printed on a printer. If you choose to have the output printed, you must also provide the printer's ID. You must also decide whether to place the Township Status Display job in the Express queue or the Nite queue on the Prime Computer.

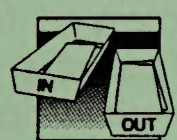


Review this form's structure and the types of data input/output.

Structure of form:

The Township Status Display Form consists of a single page divided into two separate sections. The left half of the page contains fields for entering query selection criteria and specifying the output format of retrieved Township Status Display information.

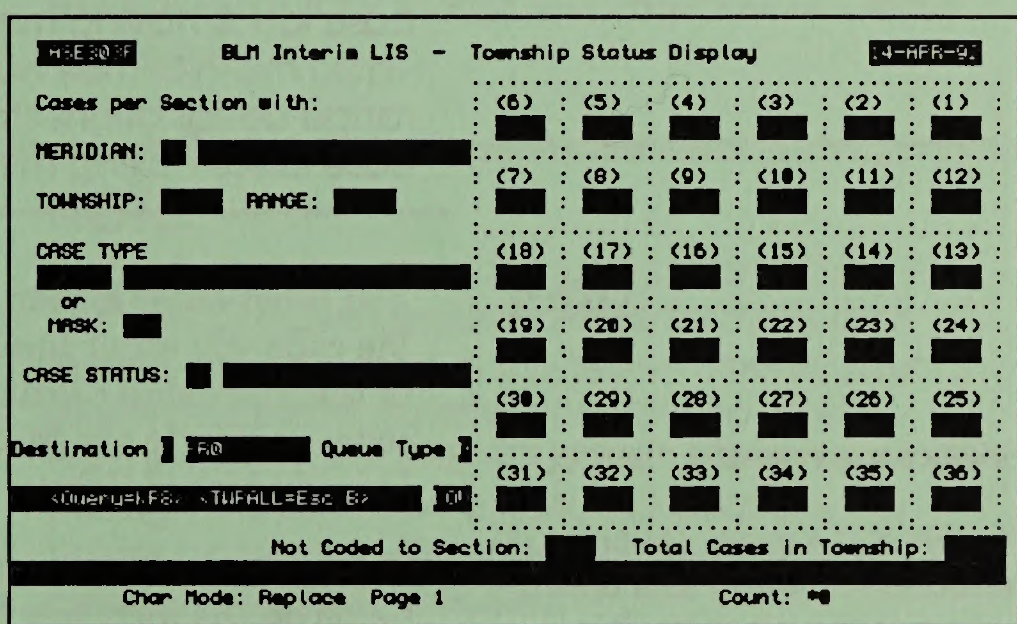
The right half of the page is used only for on-line displays of Township Status data, and graphically displays a numbered 36-section township. When you display data on-line, the numbers of appropriate cases that contain case lands in each section of the township are displayed in the sections of the township graphic. The two fields below the township graphic display the number of cases that have case lands within the township not coded to any specific section and the total number of cases that have case lands within the township.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Township Status Display form.

Use the available training aids as needed.



STEP 1

Discuss Meridian codes as well as the structure and format of the five-character Township and Range fields.

Demonstrate and discuss LOV where available.

Enter the required meridian code, five-character township designation and five-character range designation that specify the township in which you are interested. Use the List of Values (LOV) for meridian code, if necessary. See the Interim System documentation for a detailed description of the five-character township and range designations.

Discuss what is and is not verified in the Township and Range fields.

The meridian code and the direction values (N, S, E or W) of the township and range designations you enter are verified, but the form only checks whether you enter numbers, instead of other characters, in the first four characters of the Township and Range fields. It is your responsibility to enter valid township and range numbers and fractional codes for the specified meridian.

NOTE:

Briefly discuss the three special Meridian codes.

There are three special meridian codes of which you should be familiar. Meridian code 00 specifies cases that will never have land descriptions. Meridian code 98 indicates invalid land descriptions. Meridian code 99 identifies lands in cases where valid Legal Land Description data does not yet exist but will in the future.

For all three special meridian codes, you may enter 00000 in both the Township and Range fields. This is the value normally stored in the database for township and range designations for case lands having meridian codes 00 or 99. This value may (or may not) match the township and range designations stored in the database for case lands having meridian code 98.

STEP 2

Briefly explain what a mask is.

You must enter either a case type code or a mask code; the code you enter limits the number of cases included in the Township Status Display. Enter a case type code, or skip to the Mask field and enter a mask code. Use the List of Values (LOV), if necessary.

Explain that a query can be executed to retrieve data on-line once a case type or mask is entered.

Once you enter a case type or mask code, all required fields on the form are filled.

Discuss and demonstrate how to access and return from the TWPALL form.

Mention how to enter new selection criteria.

If you have no case status data to add to the selection criteria and simply want to display Township Status data on the right half of the form, press EXECUTE QUERY. Township Status data appears, and the cursor moves to the first Destination field. Follow the directions in Step 4 below to print an off-line Township Status report. To access the TWPALL/Township Summary Form for the township and selection criteria specified here, press NEXT BLOCK; exiting TWPALL returns you to the Township Status Display Form. To enter new selection criteria for another Township

Status Display, press PREVIOUS FIELD, PREVIOUS BLOCK or CLEAR FORM and enter the necessary information.

STEP 3

The Case Status field is optional and further limits the Township Status Display to cases with a specific case status. Enter the case status code, if desired, and use the List of Values (LOV), if necessary.

Describe how entering a case status further limits the database query.

To print an off-line Township Status report, press NEXT FIELD and move to the first Destination field.

Discuss and demonstrate printing an off-line report, displaying data on-line, accessing and returning from the TWPALL form and entering new selection criteria.

To display Township Status data on-line, press EXECUTE QUERY. Township Status data appears on the right half of the form, and the cursor moves to the first Destination field.

To access the TWPALL/Township Summary Form for the township and selection criteria specified here, press NEXT BLOCK; exiting TWPALL returns you to the Township Display Status Form.

To enter new selection criteria for another Township Status Display, press PREVIOUS FIELD, PREVIOUS BLOCK or CLEAR FORM and enter the necessary information.

Explain what happens if no case in the System meets the selection criteria.

NOTE:

If you display Township Status data and the number of cases displayed in all sections and fields is zero, no case in the System meets your selection criteria. To alter your criteria, press PREVIOUS FIELD or PREVIOUS BLOCK to move back through the selection criteria fields, changing values as needed. To enter completely new criteria, press CLEAR FORM.

STEP 4

The two Destination fields allow you to specify where and how you want the off-line Township Status report placed.

Enter either a P or an F in the first Destination field; the letter P indicates that you want an 80-column hardcopy printout of the Township Status Display, and the letter F indicates that you want the information written to a computer file (i.e., no hardcopy output).

Explain how to choose a printer.

The second Destination field contains the Printer ID for a particular printer in your office (and/or state). If you are printing, enter the appropriate Printer ID in the second Destination field; use LOV, if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the Township Status Display report will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the Township Status Display report request will be processed and its priority within the System.

The Express queue writes or prints the Township Status Display report as soon as possible. The Nite queue places the Township Status Display request in a batch queue for writing the file or printing the output after office hours, as specified by the Database Administrator.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express Queue.

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System generates the Township Status Display output immediately through a batch queue. You cannot cancel the Township Status Display without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue (e.g., a job that is scheduled to run after office hours), you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send a Township Status Display report request to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user78 on ZEUS) at 15:07
```

Discuss and demonstrate the use of REDISPLAY PAGE.

`Job CASE303R.090542.CPL for RUREADI (#10219) completed`

This message indicates that the Township Status Display information has been either printed out or written to a file (depending on the Destination you chose on this form). If this message overwrites a portion of an Interim System screen, press the REDISPLAY PAGE function key to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the Township Status Display data written to a file, check your office procedures for accessing and printing Township Status Display files.

Review the Quirks subsection with the class point by point and briefly summarize the use of the Township Status Display form.

Quirks and special data issues for CASE303F:

- This form allows you to generate an on-line Township Status Display, an off-line Township Status report (either as printed output or as a computer file), or both.
- This form is divided into two halves, each having a distinctly different function. The left half of the form is used to enter selection criteria. The right half of the form is used for the on-line display and only fills with data if you press EXECUTE QUERY after entering required selection criteria.
- In specifying Township Status Display selection criteria, you are required to enter a meridian code, township designation and range designation. You are also required to enter either a case type code or a mask code.
- If you display Township Status data on the right side of the form and the number of cases displayed in all fields is zero, no case in the System meets your selection criteria.
- This form allows you to access the TWPALL/Township Summary Form (CASE150F) directly and retrieve more detailed case land information that meets the selection criteria entered on the Township Display Form (CASE303F).
- When you press NEXT FIELD and COMMIT with `E` in the Queue Type field of this form, the System generates a Township Status report immediately

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

through a batch queue. You cannot cancel the Township Status report without logging out the user and batch user on the Prime.

On-line Case Abstract Form (CASE151F)

1 1/2 hours
(including Exercise B-3)

Review the purpose of the On-line Case Abstract Form. Emphasize that this is the primary form in the system for retrieving and viewing all automated data for case(s). Also mention the number of case information pages in this form, and that each page displays a different type of case data.

Purpose and use of the On-line Case Abstract Form:

This 14-page form allows you to search, view and print serialized case data on-line, off-line and through a screen display option. Based upon a set of database query selection criteria entered on the form, serialized land and mineral case records and related data are retrieved and displayed and/or printed. Depending on selection criteria, data for one or more cases may be retrieved and displayed.

For each serialized case retrieved from the System, case abstract information includes: case header data, information concerning customer linked to the case, case land data (brief and comprehensive), action information, data concerning U.S. rights reserved on case lands, units/commodity information, financial information, geographic names, general remarks, parcel occupancy data, and case status information. Each of these types of data is displayed on a separate page of the On-line Case Abstract Form. The current case serial number carries over from one page to the next throughout the form to provide visual verification of which case you are viewing.

Review who uses this form and why.

BLM personnel responsible for retrieving serialized land and mineral case information on-line and off-line from the Interim System use this form to perform their task.

Navigation to this form and use of CASE151F program name in QXFER:

Review navigation to this form (including QXFER).

The On-line Case Abstract Form (CASE151F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the On-line Case Abstract option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE151F program name.

Thoroughly discuss the inter-connection among forms and the advantages this provides users. Refer to the System Map.

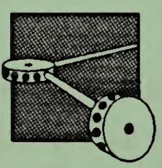
NOTE:
The On-line Case Abstract Form can be accessed directly from the TWPALL/Township Summary Form (CASE150F), FIND - Customer Form (CUST400F), FIND - Document Form (CASE400F), FIND - Claim Name Form (CASE403F), and FIND - Geographic Name Form (CASE404F).

Discuss the data required to use this form.

Required Data you must have to use this form:

- A single, valid Case Serial Number or at least one of the following: Case Type, Mask, Case Status, Survey Type, District Office, Meridian/Township/Range, or Window
- A decision to View, Print, Count Pages or Screen Display retrieved data

NOTE:
If you choose to print retrieved case abstract data, you must decide whether to have the case abstract written to a file or printed on a printer. If you choose to have the output printed, you must provide the printer's ID. You must also decide whether to place the case abstract output job in the Express queue or the Nite queue on the Prime Computer.



Review this form's basic structure and the types of data that can be entered, retrieved and/or viewed on each of its 14 pages. Refer to the System Map or everyone will be totally lost.

Structure of form:

The On-line Case Abstract Form consists of 14 pages. When you select this form from the Data Retrieval Functions Menu, the Selection Criteria page appears. This page contains fields that allow you to enter selection criteria specifying one or more cases in the System. Other fields on the Selection Criteria allow you to select whether you want to view retrieved data on the remaining pages of the form, display retrieved data in a screen display format, count the number of printed case abstract pages that would be generated for the retrieved case(s), write the data to a file or print off-line case abstract(s). The rest of the form's pages are accessed only if you choose to view retrieved case data within the form.

If you choose to view retrieved data on the remaining pages of the form, the On-line Case Abstract Retrieval Options page is displayed. While similar to menus in the System, the On-line Case Abstract Retrieval Options page only allows you to navigate among the remaining twelve pages of the form in various ways.

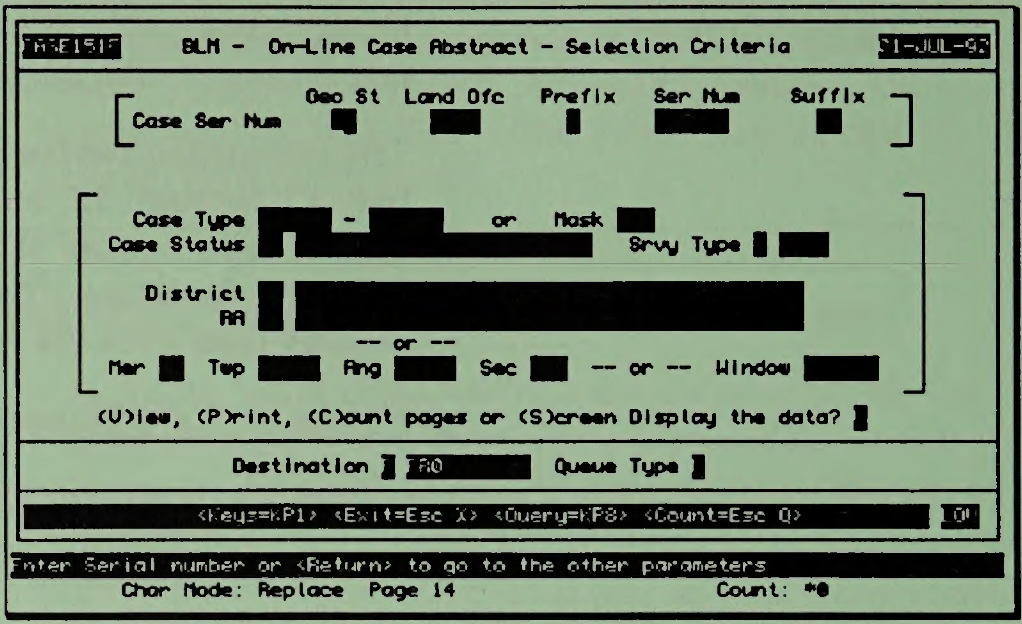
The remaining twelve pages of this form are numbered 1 through 12, and each page displays a specific type of data related to a case serial number retrieved from the database. The twelve pages of the form that display case data are as follows:

- Page 1 - Case Header Information
- Page 2 - Customer Case Information
- Page 3 - Case Land Information (Brief)
- Page 4 - Case Land Information (Comprehensive)
- Page 5 - Action Information
- Page 6 - U.S. Rights Information
- Page 7 - Units/Commodity Information
- Page 8 - Financial Information
- Page 9 - Geographic Name Information
- Page 10 - General Remarks Information
- Page 11 - Parcel Occupancy Information
- Page 12 - Case Status Information

Workflow within this form and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the On-line Case Abstract form.

Use the available training aids as needed.



STEP 1

In specifying On-line Case Abstract selection criteria, you are required to enter, at a minimum, one of the following numbers or codes: a single, valid case serial number, case type, mask, case status, survey type, BLM District Office, MTR or window. As long as you enter at least one of these types of data in the appropriate field on the Selection Criteria page, all other fields are optional.

Review the concept of specifying selection criteria for querying the database.

Discuss selection criteria choices as well as mandatory and optional fields.

WARNING:

This form limits the number of cases that can be retrieved in a database query to 200, and a message appears on the message line if this happens. While you may enter very few selection criteria for a query, selection criteria that are not specific enough may cause the System to retrieve more cases than is practical to review on-line. Some database queries based upon just one or two criteria may take a long time, tie up your terminal during the query, and cause System performance to deteriorate for everyone.

Discuss how this form only retrieves up to 200 cases and that users should make selection criteria as specific as possible to avoid the retrieval of unwanted cases.

Discuss the structure and format of the Case Serial Number fields.

Demonstrate and discuss LOV where available.

To specify a single case serial number for a query, enter the appropriate values in the Case Serial Number fields. Use the available Lists of Values (LOV) in

Describe and demonstrate what happens when a valid Case Serial Number is entered.

the Geographic State and Land Office fields, if necessary. Once a valid case serial number is entered, the cursor automatically moves to the Do you want to (V)iew, (P)rint, (C)ount Pages or (S)creen Display the data? field.

Thoroughly review the entry of criteria to specify multiple cases. Discuss each data element and how it limits the scope of the database query.

To enter selection criteria that specify multiple cases, skip the Case Serial Number fields and enter value(s) in one or more of the remaining fields in this block (excluding the Do you want to (V)iew, (P)rint, (C)ount Pages or (S)creen Display the data? field).

STEP 2

To limit a query to cases of a one or more specific case type(s), enter the case type code for a single case type (or the lower-limit case type of a range) in the first Case Type field. Use the available List of Values (LOV), if necessary. The second Case Type field defaults to the first field's value. If you only want to specify one case type, accept the second field's default and move to the Case Status field. If you want to specify a range of case types, enter the upper-limit of the case type range in the second field.

Emphasize that case type(s) or a mask can be specified but not both.

NOTE:
Skip the Case Type fields if you wish to specify a mask in the selection criteria.

To limit a query to cases within a mask, skip the Case Type fields and enter a mask code. Use the available List of Values (LOV), if necessary.

To limit a query to cases having a specific status, enter the status code in the Case Status field. Use the available List of Values (LOV), if necessary. Case status is set by certain action codes.

To limit a query to cases with lands having a specific survey type, enter the survey type code in the Survey Type field. Use the available List of Values (LOV), if necessary.

STEP 3

NOTE:

You may specify only one of the following three types of data: BLM District, Meridian/Township/Range, or Window. These all limit a query to cases within a specific geographic area. If you attempt to specify more than one type of geographic area, previously entered geographic area selection criteria are cleared automatically from the form. Only one geographic area can be specified at a time.

Discuss how only one type of geographic area may be specified for a database query.

To limit a query to cases with lands in a specific BLM district, enter the district code in the District field. Use the available List of Values (LOV), if necessary. You may further limit a query to cases with lands in a specific BLM Resource Area (within the specified district) by entering the Resource Area code in the optional Resource Area field. Use the available List of Values (LOV), if necessary. You cannot specify a Resource Area without also specifying a BLM district.

Mention that Alaska users should always skip the RA field.

Emphasize that MTRS data or a Window can be specified but not both.

To limit a query to cases with lands in a specific township, first enter the appropriate meridian code in the Meridian field. Use the available List of Values (LOV), if necessary.

Emphasize that a Meridian cannot be specified alone; Township and Range values specifying a single township must also be entered.

NOTE:

There are three special meridian codes of which you should be familiar. Meridian code `00` specifies lands in cases that will never have land descriptions, and meridian code `99` specifies lands in cases where valid LLD data does not yet exist, but will in the future. Both of these meridian codes are normally associated with township and range values of `00000`. Meridian code `98` indicates invalid land descriptions, and is normally associated with township and range values other than `00000`.

Although you may enter the three special meridian codes in the Meridian field, you may not enter `00000` in either the Township or Range fields.

Emphasize that `00000` cannot be entered in the Township and Range fields, and discuss how this normally limits the effectiveness of specifying Meridian codes `00` and `99`.

Review the format of the five-character Township and Range fields and discuss the validation available in these fields.

After entering a meridian code, enter a five-character township designation in the Township field, and a five-character range designation in the Range field

NOTE:

While the System verifies the meridian code you enter on this form, it only checks the direction values (N, S, E or W) of the township and range designations. It is your responsibility to enter valid township and range designations.

Mention that a Section value is optional.

Once you have entered meridian, township and range values, you may further limit a query to cases with lands in a single section of the specified township by entering a section number in the Section field. This field is optional.

To limit a query to cases with lands in a specific window, enter the window code in the Window field. Use the available List of Values (LOV), if necessary.

Press NEXT FIELD in the Window field to execute the On-line Case Abstract query.

Emphasize that pressing NEXT FIELD in the Window field executes the form's query. Also discuss what happens during a database query.

NOTE:

The System uses the selection criteria you have entered to query the database for all serialized cases and related information meeting these parameters. Depending on the number of cases that meet the criteria and the amount of System usage, the query may take anywhere from a few seconds to several minutes. The number of cases found during the query is displayed on the message line, and the cursor moves to the Do you want to (V)iew, (P)rint, (C)ount Pages or (S)creen Display the data? field.

If the number of records retrieved is zero, no case in the System meets your selection criteria. To alter these criteria, use NEXT FIELD and PREVIOUS FIELD to move through the fields on this page and change, delete and add values as needed.

STEP 4

Thoroughly review and demonstrate the View, Print, Count Pages and Screen Display options.

The Do you want to (V)iew, (P)rint, (C)ount Pages or (S)creen Display the data? field is used to specify the type of action you are taking within the On-line Case Abstract form. The field defaults to V to view the case information displayed on the remaining 12 pages of the form.

V allows you to view data in the retrieved case(s) on pages 1 through 12. (P)rint, (C)ount Pages and (S)creen Display all refer to the 80-column Case Abstract report that can be generated with this form. P allows you to either write the retrieved data to a computer file, or output case abstract(s) to a printer. C returns a count of the number of pages that would be generated for the case abstract(s) of retrieved case(s). S allows you to display the case abstract(s) on your terminal screen.

Enter V to view the retrieved data in the fields on pages 1 through 12. Press NEXT FIELD to continue to the Retrieval Options page.

Explain the use of Q to stop the building and page counting of abstract(s).

Enter C and press NEXT FIELD to have the form display the number of pages that would be generated in Case Abstract report for all retrieved case(s). The computer screen clears and the number of pages is tallied as the System builds the abstract(s). To abort the page count and construction of abstract(s), press Q. After the final count is displayed, you have the option to print, screen display or quit (i.e., return) to the Selection Criteria Page.

Explain that the Screen display and Off-line Case Abstract Reports are identical.

Review the examples of a screen display and report in this section of the training guide.

Explain the use of Q to exit a screen display.

Enter S and press NEXT FIELD to display the Case Abstract report for all retrieved case(s). The On-line Case Abstract Form clears from your computer screen, and the case abstract(s) begin to scroll onto it; scrolling stops when the computer screen is full. To display the next screen-full of the report, press NEXT FIELD. To exit a screen display before its completion, enter Q and press NEXT FIELD. When a screen display completes, press NEXT FIELD to return to the Do you want to (V)iew, (P)rint, (C)ount Pages or (S)creen Display the data? field on the Selection Criteria Page.

Enter P and press NEXT FIELD to either write the case abstract(s) for all retrieved case(s) to a computer file or print the abstract(s) on a printer. The cursor moves to the first Destination field.

Case Abstract - Screen Display

```
CASE230R          BUREAU OF LAND MANAGEMENT - INTERIM LIS            27-MAR-1991
ADM-STATE:  ALASKA              CASE FILE EXTRACT                     PAGE 1
CASE SERIAL NUMBER: AKF    024577
CASE STATUS:        PENDING
CASE TYPE:          262730 GENERAL GRANT
DISTRICT:           ANCHORAGE DISTRICT OFFICE
BOROUGH:
     FAIRBANKS NORTH STAR
NATIVE REGION:
TERM OF LEASE QTY:  0
--------------------------------------------------------------------------------
                                   CUSTOMER
CUSTID: 000027242            INT REL: APPLICANT               PCT INT:    .00000
CUST NAME: STATE OF ALASKA DEPARTMENT OF NATURAL RESOURCES
CUST ADDRESS: DIV LAND/WATER MGT LAND TITLE
              3601 C STREET SUITE 960
              ANCHORAGE  AK  99503
--------------------------------------------------------------------------------
                                  ACTION DATA
NUM   DATE         P CODE/DESC                         RMKS           OFC  EMPL
DOC TYPE NUM         REC NO     VOL ID  BOOK PAGE      MONEY AMT      ACCT ADV
001 11-DEC-1959      001 APLN RCD/CASE ESTABLISH                      PSA  SP
002 11-DEC-1959      072 FILING FEE RECEIVED                          AJA  DLP
011 05-OCT-1961      341 PROOF OF PUB RECEIVED                        PSA  SP
ETC...
--------------------------------------------------------------------------------
                                GENERAL REMARKS
  1 MINING CLAIM PRIOR TO SS
  IN SEC 36
  FY-90 TA PRI C023
  FY-91 T APRI C18
--------------------------------------------------------------------------------
                                FINANCIAL DATA
002 11-DEC-1959 072 FILING FEE RECEIVED    30.00
                     Total for this Case:  30.00
--------------------------------------------------------------------------------
                             PARCEL OCCUPANCY DATA
PARCEL OCC        -------------------LAST ACT-----------------------------------
CODE   DATE      CODE    DATE     DESC                                2ND DATE TYPE
  No Data Found
--------------------------------------------------------------------------------
                                   FRC DATA
FRC CODE: SEA ACCESSION NUM: 49790096 BOX NUM: 353 BOX QNTY: 360
   LOCATION CODE: RIP
--------------------------------------------------------------------------------
                               GEOGRAPHIC NAMES
   ANCHORAGE PLAINS
--------------------------------------------------------------------------------
                               LAND DESCRIPTION
NUM P DISPOSITION     MER TWP   RNG   SEC ALIQUOT  SURVEY TYPE/NUM  ACRES
00003 PA 01232836     13  0010N 0030W 001 S2N2                      160.0000
 USR: AK3
ETC...
```

```
CASE230R           BUREAU OF LAND MANAGEMENT - INTERIM LIS              4-7-1992
ADM-STATE:  ALASKA                  CASE ABSTRACT                       PAGE 1
CASE SERIAL NUMBER: AKAA  031280
CASE STATUS:
CASE TYPE:        256100 ALASKA NATIVE ALLOTMENT
DISTRICT:         ANCHORAGE DISTRICT OFFICE
BOROUGH:
TERM OF LEASE QTY:  0
----------------------------------------------------------------------------------
                                    CUSTOMER
CUSTID:           000028536  INT REL: APPLICANT                PCT INT:     .00000
CUST NAME:        FOX MOSES
CUST ADDRESS:     GENERAL DELIVERY
                  QUINHAGAK                AK   99655
----------------------------------------------------------------------------------
                                  ACTION DATA
NUM   DATE       P CODE/DESC                       RMKS                  OFC    EMPL
DOC TYPE NUM       REC NO      VOL ID BOOK     PAGE       MONEY AMT    ACCT ADV
001 05-DEC-1979 A 001 APPLICATION FILED          APPLICATON RECEIVED    AJA    DLC
                                         .
                                         .
007 05-JUN-1983 A REPORT REQUESTED               BIA                    DAO    MMJ
PEND-ENTY OTH: BUREAU OF INDIAN AFFAIRS
102 09-JUN-1992 A 860 ALLOTMENT CERT ISSUED                                    TIG
    PA 00090692
----------------------------------------------------------------------------------
                                 COMMODITY DATA
ACTION                                                 MEASUREMENT
NUM DESCRIPTION             COMMODITY              CODE    QUANTITY    MONEY AMOUNT
                                NO DATA FOUND
----------------------------------------------------------------------------------
                                 GENERAL REMARKS
        FINAL PROTEST DATE 07/03/84
        IN PPP WINDOW # 1562
----------------------------------------------------------------------------------
                                 FINANCIAL DATA
          ACTION CODE      DESCRIPTION                 MONEY TOTAL
        No Data Found
----------------------------------------------------------------------------------
                              PARCEL OCCUPANCY DATA
PARCEL  OCC       ------------------LAST ACT--------------------------------------
CODE    DATE       CODE    DATE      DESC                            2nd DATE TYPE
 A    01- 08-1950  001 05-DEC-1979 APPLICATION FILED
 B    01- 08-1950  001 05-DEC-1979 APPLICATION FILED
 C    01- 08-1950  001 05-DEC-1979 APPLICATION FILED
----------------------------------------------------------------------------------
                                    FRC DATA
FRC CODE: SEA ACCESSION NUM:                   BOX NUM:       BOX QNTY:
----------------------------------------------------------------------------------
                                 GEOGRAPHIC NAMES
  No Data Found
----------------------------------------------------------------------------------
                                 LAND DESCRIPTION
     CASLND/
NUM    P STATUS/DOCID   MER   TWP     RNG   SEC  ALIQUOT      SURVEY TYPE/NUM      ACRES
00001 A CV   9791205    28    5S      74W     3               USS  009665         69.960
  ANCSA: 0 NR: 03                                             LOT  1
00002 C CV  9791205     28    4S      74W    27               USS  009532          8.000
  ANCSA: 0 NR: 03                                             LOT  2
00003 B CV  9791205     28    4S      74W    16               USS  009531         24.000
  ANCSA: 0 NR: 03                                             LOT  2
00004 A CV  9791205     28    5S      74W     4               USS  009665         10.000
  ANCSA: 0 NR: 03                                             LOT  1
00005 C CV  9791205     28    4S      74W    21               USS  009531         16.970
  ANCSA: 0 NR: 03                                             LOT  2
00006 C CV  9791205     28    4S      74W    26               USS  009532         31.980
  ANCSA: 0 NR: 03                                             LOT  2
                                      TOTAL CASE ACRES BALANCE:            159.9100
                                              CONVEYED TOTAL:              159.9100
                 END OF CASE FILE: AKAA   031280
```

STEP 5

The two Destination fields allow you to specify where and how you want Case Abstract report information placed.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a printout of the Case Abstract report, and the letter F indicates that you want the information written to a computer file with no hardcopy output.

Explain how to choose a printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. If you are printing, enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the Case Abstract report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the Case Abstract report request will be processed and its priority within the System.

The Express queue writes or prints the report as soon as possible. The Nite queue places the report request in a batch queue for writing the file or printing the output after office hours, as specified by the Database Administrator.

Emphasize that the average System user cannot stop a report once it has been sent to a queue, especially the Express Queue.

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System generates the Case Abstract report immediately through a batch queue. You cannot cancel the case abstract without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue (e.g., a job that is scheduled to run after office hours), you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send a Case Abstract report to the Express queue, you may receive a message similar to the following on your terminal:

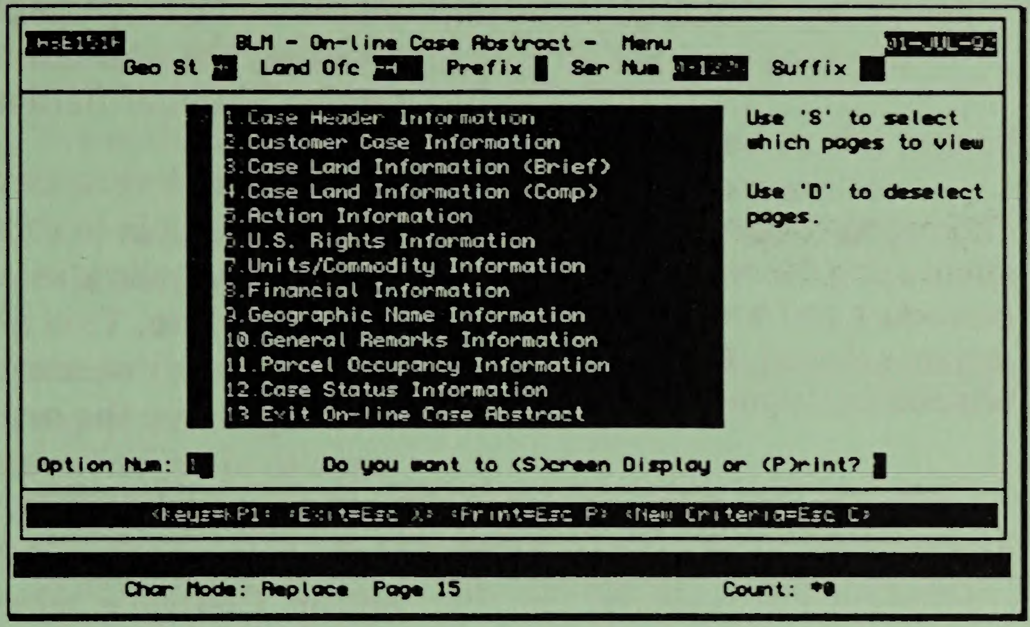
```
•••BATCH_SERVICE (user34 on ZEUS) at 11:27

Job CASE223R.115322.CPL for RUREADI
(#34529) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the Case Abstract report has been either printed out or written to a file (depending on the Destination you chose on this form). If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have case abstract data written to a file, check your office procedures for accessing and printing case abstract files.



STEP 6

Explain how the Retrieval Options Page and the 12 case data pages refer to one of the case(s) retrieved by the form's database query. Emphasize that it is easy to scroll to other cases retrieved in the query.

NOTE:

This form's Retrieval Options page, as well as its 12 case information pages, refer to one specific case serial number. As you move from one case information page to another, the current case serial number always carries over. If more than one case is retrieved by the form's query, you can move from one case to the next or previous case using the NEXT/PREVIOUS CASE function keys identified on the legend line.

The On-line Case Abstract Retrieval Options page lists the name of each of the 12 pages that display detailed information for a case. For any one case retrieved by a query, the Retrieval Options page provides you with two ways to navigate among the 12 case information pages.

Discuss and demonstrate directly accessing case data pages by using the selection arrow and entering option numbers.

First, you can directly access any one of the 12 pages by moving a selection arrow (located in the left-most column on the page) up and down the retrieval options list of page names, placing the arrow beside the page you want to view and pressing NEXT FIELD. Instead of using the arrow, you can enter the page's option number in the Option Number field below the retrieval options list, press NEXT FIELD, and move directly to the specific page.

From each page of this form, you may return to the Retrieval Options page or continue to another page by entering the appropriate option number in the page's Option Number field and pressing NEXT FIELD.

Thoroughly review and demonstrate using the select/deselect procedure and how to navigate among selected (and unselected) pages.

The second way to navigate among the 12 case information pages is to select several specific case information pages to view in sequence using the Select/Deselect procedure. This allows you to automatically skip pages you do not want to see. To select pages for viewing, move the arrow beside the first page you want to view, enter an **S** in the Option Number field, and press NEXT/PREVIOUS RECORD. When the arrow is moved, an **SS** appears next to the selected option. Continue selecting other pages, if desired, until an **SS** appears next to all the pages you want to view. Press NEXT BLOCK to access the first selected page below listed below the cursor position on the Retrieval Options page. Press NEXT/PREVIOUS BLOCK to continue moving from one selected page to the next selected page and back.

Emphasize that, to view all the case data pages, no pages need to be specifically selected.

NOTE:
If you wish to view all of the case information pages, it is unnecessary to select each retrieval option using the Select/Deselect procedure since each page's Option Number field automatically defaults to the next consecutive option as listed on the Retrieval Options page.

To deselect a selected option, move the arrow over the **SS**, enter **D**, and press NEXT RECORD.

NOTE:
While you access and view selected pages, you may also access unselected pages using the option numbers to move from page to page.

Explain how to generate case abstract/extract output and screen displays from the Retrieval Options page. Thoroughly explain case extracts.

The Retrieval Options page also allows you to generate a screen display of retrieved case information and/ or output case abstracts to a printer or file. The data contained in these on- and off-line abstracts reflects

any selections you have made using the Select/Deselect procedure on the Retrieval Options page. These subsets of case abstracts are called case extracts.

Press the PRINT function key identified on the legend line and move the cursor to the Do you want to (S)creen Display or (P)rint? field below the list of retrieval options.

NOTE:
If specific data pages were not selected before accessing the Do you want to (**S**)creen Display or (**P**)rint? field, entire case abstract(s) are displayed/printed instead of case extracts.

Enter S to obtain a screen display of retrieved case data, or enter P and move to the first Destination field on the Selection Criteria page to output abstracts to a printer or file.

Remind students that after this form retrieves multiple cases, printed reports and screen displays contain abstracts for all retrieved cases.

NOTE:
Although a single, current case serial number appears at the top of the Retrieval Options page, any screen display or off-line output of case abstract data contains information for all cases retrieved as a result of the query executed on the Selection Criteria page.

STEP 7

Thoroughly review the common functions and navigation options available on the 12 case data pages.

The 12 case information pages on this form have several functions in common:

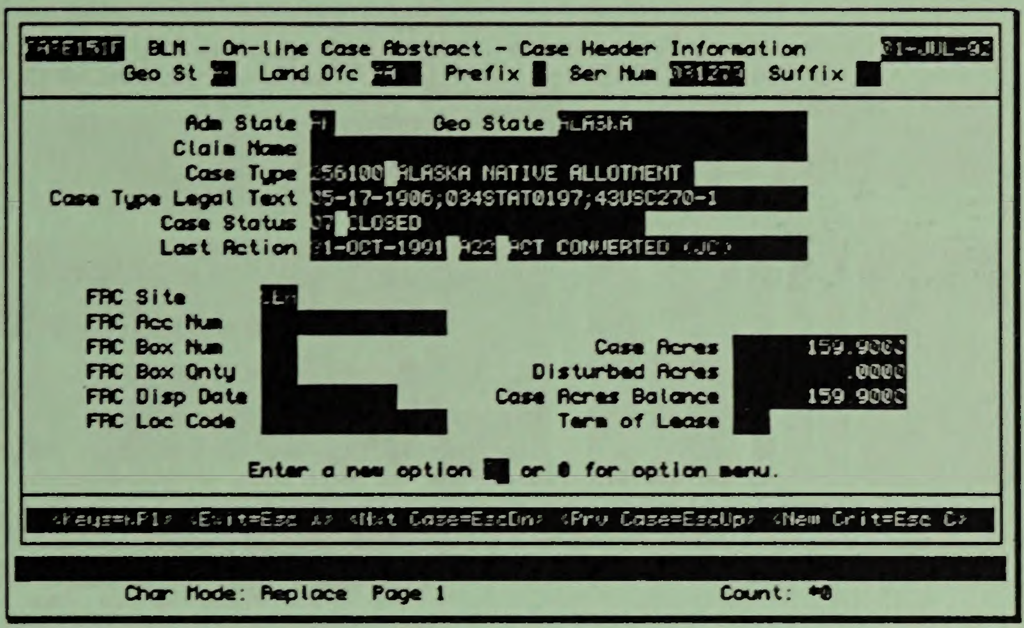
- From any page, you can access the Retrieval Options page directly by pressing CURSOR HOME or entering 0 (zero) in the Option Number field.
- From any page, you can return to the Selection Criteria page to enter parameters for another On-line Case Abstract query by pressing CLEAR FORM.
- Each page's Option Number field automatically defaults to the next consecutive page number. Although the Case Land Information - Brief page and

the Action Information page do not have a labeled Option Number field, the left-most column of their bottom block of fields functions as one.

- You can move from one case information page to another by entering the destination page number (listed on the Retrieval Options page) in the Option Number field.
- If you selected pages on the Retrieval Options page using the Select/Deselect procedure, you may move from one selected page to another using NEXT/ PREVIOUS BLOCK.
- If multiple records in a case are retrieved for a case information page, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll through the records. This is true on all pages, whether they display one record at a time or multiple records.
- The current case serial number is displayed at the top of all 12 case information pages.

Demonstrate and discuss how to move from one case to another on the 12 case data pages and the Retrieval Options page.

- If multiple cases are retrieved by the form's data-base query, you can move from one case to another on any of the 12 case data pages (as well as the Retrieval Options page) using the NEXT/PREVIOUS CASE function keys identified on the legend line.



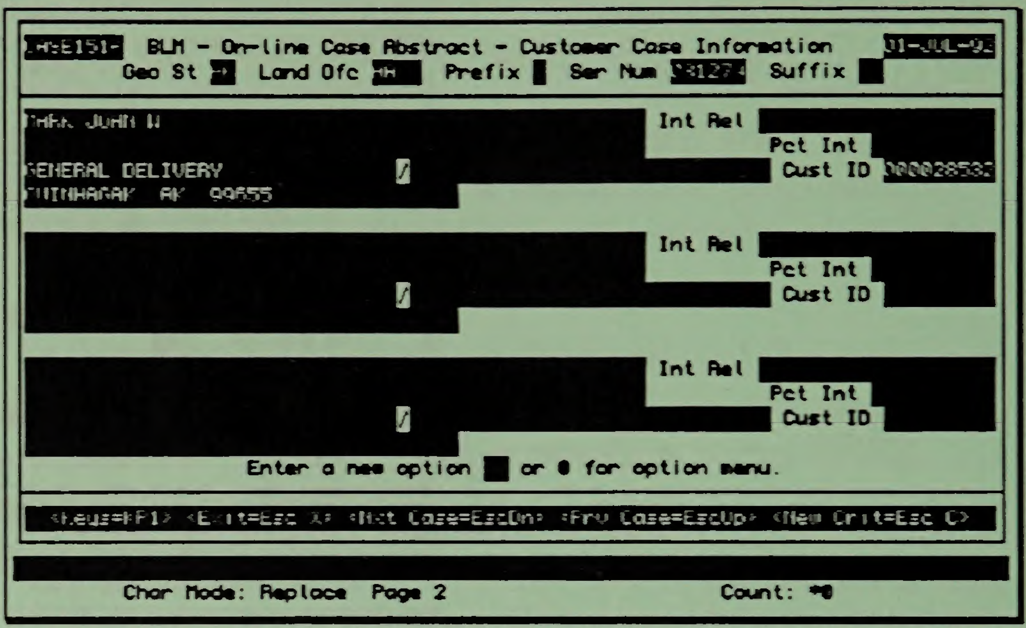
Review and discuss each of the data elements on the Header Information Page.

The Case Header Information page (page 1) allows you to view case header record data for the case(s) retrieved by this form's database query. This page displays the following information concerning the current case serial number: case serial number, administrative state, geographic state, claim name (for mining claim cases), case type, case type legal text, case status, the action date, code and description of the latest action in the case, Federal Records Center (FRC) site, accession number, box number, box quantity, disposal date and location code, case acres, disturbed acres (for surface management cases), case acres balance, and term of lease.

Discuss and demonstrate use of the Enter a New Option field and explain that queries cannot be executed on this page.

Review how to move to other cases if they were retrieved by the form's database query.

The Enter a New Option field is the only accessible field on this page, and contains the default value of 2, the next consecutive page number. You may not enter and execute queries on this page.



Review and discuss each of the data elements on the Customer Case Information page.

The Customer Case Information page (page 2) allows you to view customer information for the case(s) retrieved by this form's database query. This page contains the following information concerning each customer for the current case serial number, displayed in the appropriate fields: case serial number, customer name and address, interest relationship, percent interest and customer ID.

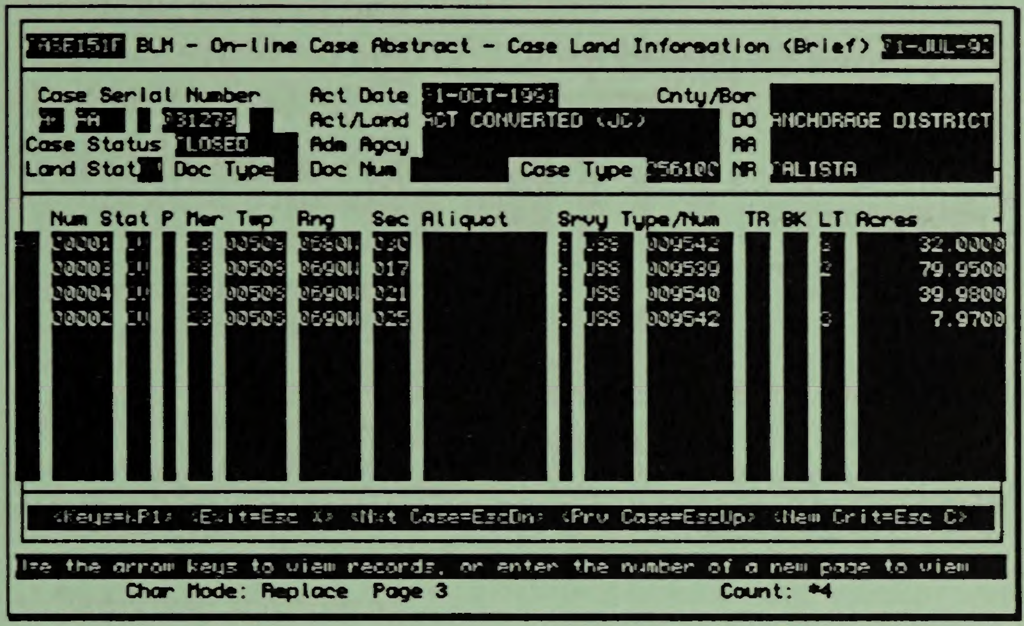
Demonstrate how to scroll to additional customers.

This page displays data for up to three customers, and allows you to scroll to and display additional customers.

The Enter a New Option field contains a default value of 3, the next consecutive page number.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of case customers.

You may enter and execute queries, bases on parameters entered in the customer data fields that selectively display a subset of the customers linked to the current case.



Review the basic structure of the Case Land Information - Brief page.

The Case Land Information - Brief page (page 3) allows you to view basic case land information for each land record within the case(s) retrieved by this form's database query.

Review and discuss each of the data elements in the lower block. Explain which case land is current and how to scroll through case lands.

The page is divided into two distinct blocks. The bottom block of fields displays up to ten case land records for the current case serial number, and you may scroll to and display additional records using NEXT/PREVIOUS RECORD, NEXT/PREVIOUS SET and LAST SET. Case land records are displayed in order by meridian, township, range and section. For each case land record, the bottom block displays the following data: land number, land status, parcel code, meridian, township, range, section, aliquot part, survey type and number, tract, block, lot, and case land acres. The cursor appears on one of these records in the left-most field of the bottom block along with an arrow (=>). The position of the cursor and arrow indicates the current case land record.

Review how and why land numbers are assigned in the System. Explain why land numbers may not be in order as displayed on this page.

Within any one land or mineral case, land numbers are assigned uniquely, sequentially and permanently to individual case lands. Because this page sorts lands by MTRS, land numbers may not be in sequential order. In addition, not all land numbers may appear for a case due to deletions of lands.

Review and discuss each of the data elements in the upper block. Explain the relationship of this information to the current case land in the lower block.

The top block of fields contains case land, case and action information specific to the current case land record in the bottom block. For the current case land record, the top block displays the following data: case

serial number, case status, land status, document type and number, action date of the last action linked to the current case land, action/land (i.e., the description of the last action linked to the case land), administrative agency, case type, county/borough, District Office, Resource Area and Native Region. You may not access the fields in the top block. These fields simply provide additional information about the current case land identified in the bottom block.

Briefly review the concept and importance of action/land ties.

Action information is displayed in the top block only if the current case land has been linked with a specific action record in the case. Individual case lands and individual actions are linked within a case by BLM personnel responsible for the entry and/or updates of land and mineral case information in the Interim System.

You may scroll through the displayed case lands in the bottom block by moving the cursor and arrow up and down. As you move from one record to the next, you change the current case land, and the data displayed in the top block of fields changes accordingly.

Emphasize the synchronization between data in the upper block and the current case land in the lower block.

NOTE:
Data displayed in the top block remains synchronized with the current case land.

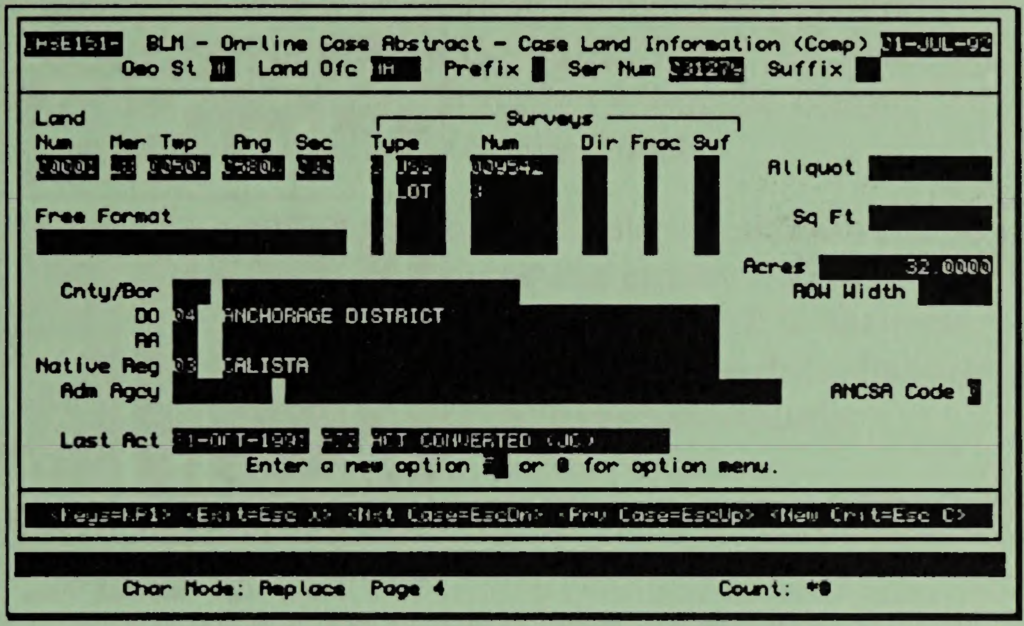
Demonstrate and discuss entering and executing a query (including the use of the optional wildcard character) to display a subset of lands in the current case.

You may enter and execute queries, based on parameters entered in the bottom block of fields, to selectively display a subset of the case land records within the current case. Query parameters may not be entered in the Tract, Block and Lot fields.

Explain how to use the left-most column of the lower block as an Option Number field.

Emphasize that the current case land on the Brief page determines the data that is displayed on the Comprehensive page.

NOTE:
Although this page does not have a labeled Option Number field, the left-most column of the bottom block functions as one. Enter the page number of the destination page in the field containing the arrow. The default is 4, the next consecutive page number. If you choose the default, detailed data for the current case land appears on the Case Land Information - Comprehensive page.



Emphasize the relationship between the case land data displayed on the Case Land Information - Comprehensive page and the current land record on the Brief page.

Review and discuss each of the data elements on the Comprehensive page.

The Case Land Information - Comprehensive page (page 4) allows you to view comprehensive land information for each land within the case(s) retrieved by this form's database query. This page lists the following detailed data concerning the current case land selected on the Case Land Information - Brief page: case serial number, land number, meridian, township, range, section, free format, survey type, number, direction, fraction and suffix, aliquot part, square feet, case land acres, ROW width, county/borough, District Office, Resource Area, Native Region, administrative agency, ANCSA code and the action date/code/description of the last action linked to the case land record.

Use NEXT/PREVIOUS RECORD to access and view detailed data for all lands in the current case.

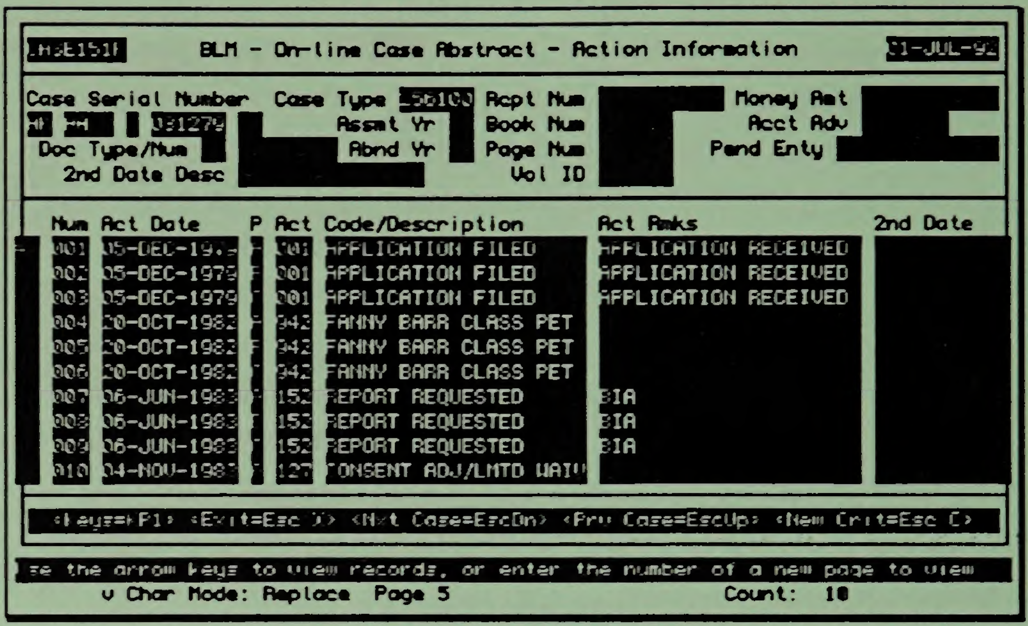
Demonstrate and discuss what happens when a user scrolls to other case lands in the current case.

NOTE:

Only one case land appears on this page at a time. Each time you press NEXT/PREVIOUS RECORD on the Comprehensive page, the form returns momentarily to the Brief Case Land page, retrieves the next or previous land record, then reaccesses the Comprehensive page and displays detailed data for the selected land.

Review the use of the Enter a New Option field and explain that queries cannot be executed on this page.

The Enter a New Option field is the only accessible field on this page, and contains a default value of 5, the next consecutive page number. You may not enter and execute queries on this page.



Review the basic structure of the Action Information page.

The Action Information page (page 5) allows you to view action information for the case(s) retrieved by this form's database query.

Review and discuss each of the data elements in the lower block. Explain which action is current and how to scroll through actions.

The page is divided into two distinct blocks. The bottom block of fields displays up to ten action records for the current case serial number, and you may scroll to and display additional records using NEXT/PREVIOUS RECORD, NEXT/PREVIOUS SET AND LAST SET. Action records are displayed in order by action date. For each action record, the bottom block displays the following data: action number, action date, parcel code, action code/description, action remarks and second date. The cursor appears on one of these records in the left-most field of the bottom block along with an arrow (=>). The position of the cursor and arrow indicates the current action record.

Review how and why action numbers are used by the System. Explain why action numbers may not be displayed in order on this page.

Within any one land or mineral case, action numbers are assigned uniquely, sequentially and permanently to individual actions. Because this page sorts actions by date, action numbers may not be in sequential order. In addition, not all action numbers may appear for a case due to deletions of actions.

Review and discuss each of the data elements in the upper block. Explain the relationship of this information to the current action in the lower block.

The top block of fields contains case and comprehensive action information specific to the current action record in the bottom block of fields. For the current action record, the top block displays the following data: case serial number, document type and number, second date description, case type, assessment year, abandonment year, receipt number, book number,

page number, volume ID, money amount, accounting advice number and pending entity. You may not access the fields in the top block. These fields simply provide additional information about the current action identified in the bottom block.

Emphasize the synchronization between data in the upper block and the current action in the lower block.

You may scroll through the displayed action records in the bottom block by moving the cursor and arrow up and down. As you move from one record to the next, you change the current action, and the data displayed in the top block of fields changes accordingly.

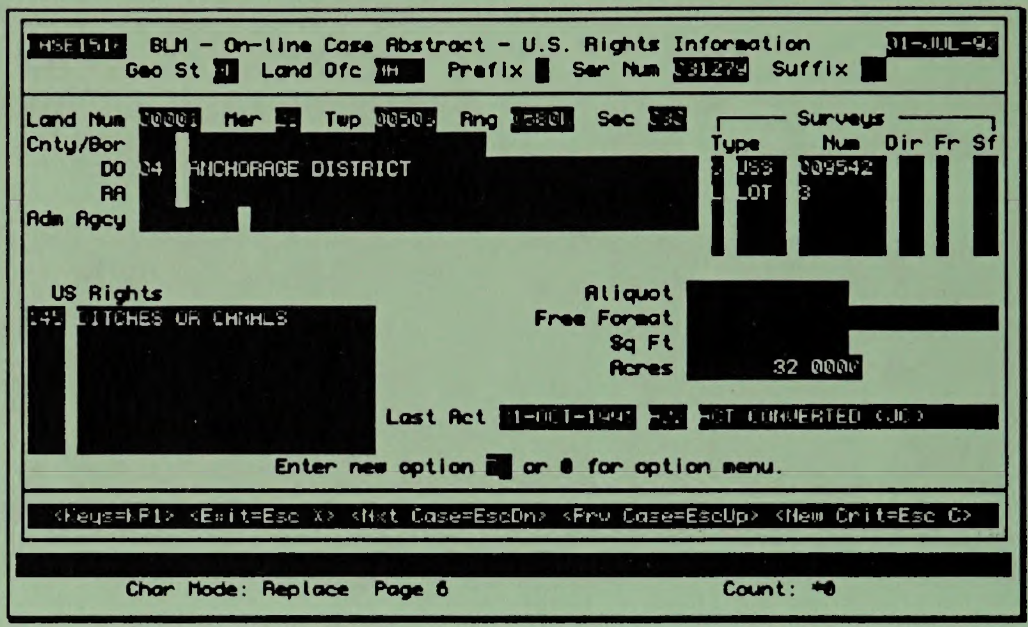
NOTE:
Data displayed in the top block remains synchronized with the current action in the bottom block.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of actions in the current case.

You may enter and execute queries, based on parameters entered in the bottom block of fields, to selectively display a subset of the action records within the current case.

Explain how to use the left-most column of the lower block as an Option Number field.

NOTE:
Although this page does not have a labeled Option Number field, the left-most column of the bottom block functions as one. Enter the page number of the destination page in the field containing the arrow. The default is 6, the next consecutive page number.



Review and discuss each of the data elements on the U.S. Rights Information page.

Explain that U.S. rights are reserved on a case land because of an action in case. Emphasize that an appropriate action/land tie must exist for U.S. rights to be reserved on the case land.

Demonstrate how to scroll to additional case lands in the current case and U.S. rights for the current land.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of U.S. right reserved on the current case land.

The U.S. Rights Information page (page 6) allows you to view U.S. rights reserved on each case land in the case(s) retrieved by this form's database query. This page displays the following land description, U.S. rights, and linked action data for each land in the current case: case serial number, land number, meridian, township, range, section, county/borough, District Office, Resource Area, administrative agency, survey type, number, direction, fraction and suffix, U.S. rights, aliquot part, free format, square feet, case land acres, and the action date/code/description of the last action linked to the case land.

Case lands appear on this page in order by meridian, township, range and section, one case land at a time. Use NEXT/PREVIOUS RECORD to scroll to other case lands not currently displayed. Each case land in the current case is displayed, whether U.S. rights are reserved on it or not. If more than six U.S. rights are reserved on a case land, use NEXT/PREVIOUS SET to scroll to the additional rights.

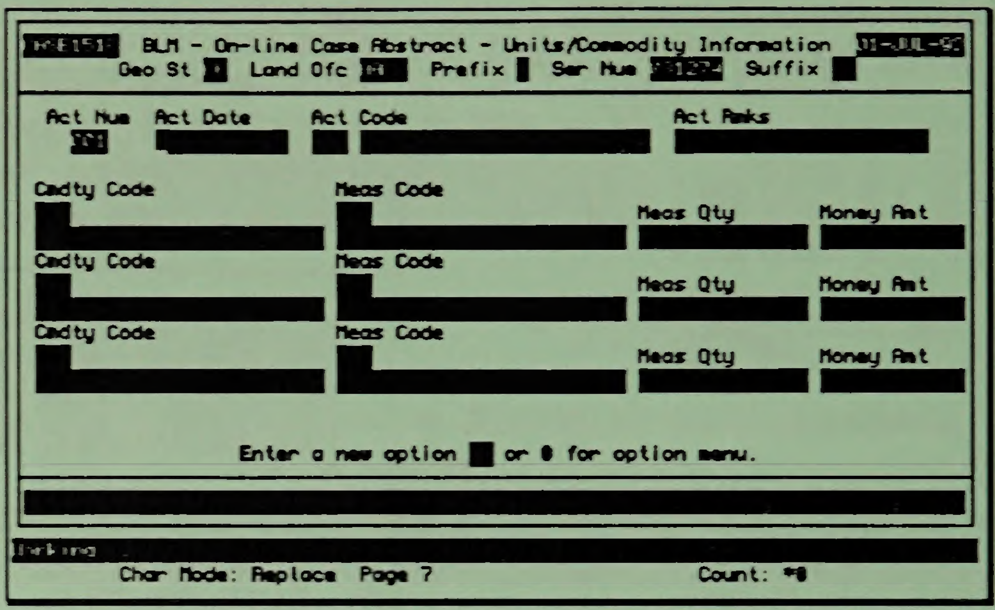
The Enter a New Option field contains a default value of 7, the next consecutive page number.

You may enter and execute queries, based on parameters entered in the U.S. Rights field, to selectively display a subset of the U.S. rights reserved on the current case land.

Emphasize that U.S. rights are cumulative on a case land throughout the history of a case.

NOTE:

Although this page lists only the last action linked to the displayed case land, U.S. rights reserved on the land may be the cumulative result of several different actions in the current case.



Review and discuss each of the data elements on the Units/Commodity Information page.

Explain how and why units/commodity data are linked to individual actions in a case.

The Units/Commodity Information page (page 7) allows you to view units/commodity information linked to individual actions within the case(s) retrieved by this form's database query. This page displays the following units/commodity and action data for each action within the current case: case serial number, action number, action date, action code, action description, and action remarks for the current action record, commodity code, measurement code, measurement quantity and money amount.

Demonstrate how to scroll to additional units/commodity records.

Up to three units/commodity records are displayed on the form in order by action number and commodity code. If more than three units/commodity records are linked with the current action, use NEXT/PREVIOUS SET to scroll to other records not currently displayed. Use NEXT/PREVIOUS RECORD to scroll to other action records in the case not currently displayed.

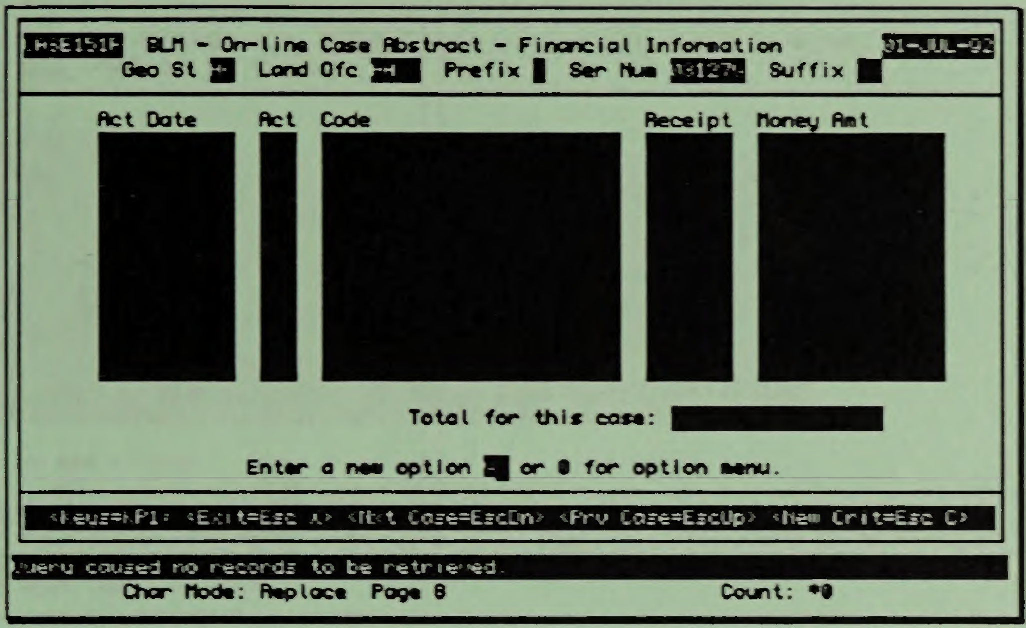
The Enter a New Option field contains a default value of 8, the next consecutive page number.

Demonstrate and discuss entering and executing a query (including the use of the optional wildcard character) to retrieve specific action(s) in the current case.

You may enter and execute queries, based on parameters entered in the action data fields, to retrieve a specific action or set of actions within the current case.

NOTE:

You may only enter query parameters in the action fields on this form. The cursor does not access the units/commodity record fields when in query mode.



Review and discuss each of the data elements on the Financial Information page.

Emphasize that all actions containing money amount are displayed.

Demonstrate how to scroll to additional money actions.

Review use of the Enter a New Option field as well as how to move to other cases if they were retrieved by the form's query.

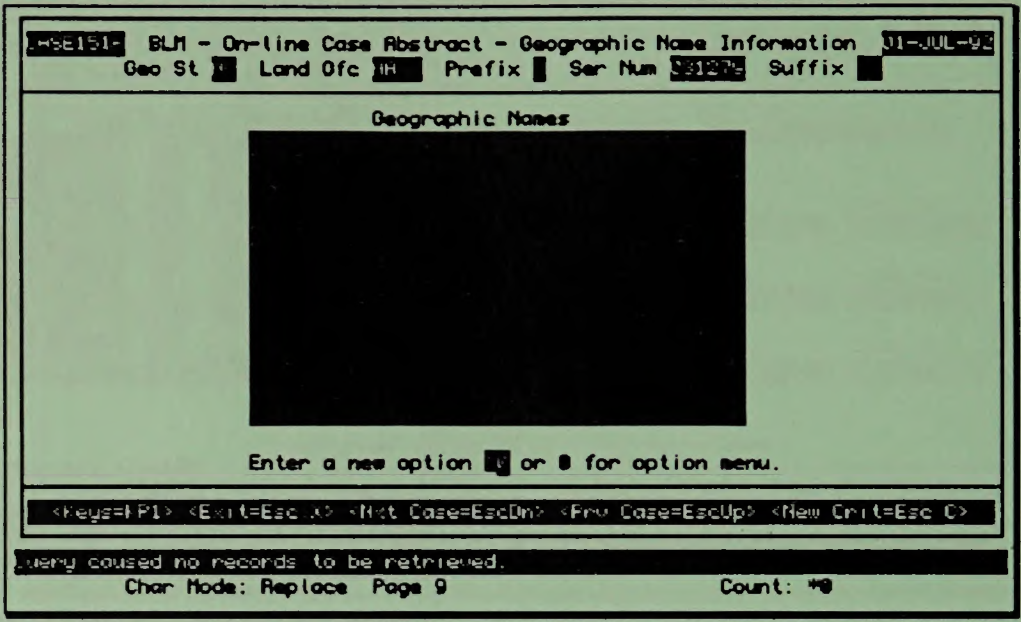
Demonstrate and discuss entering and executing a query (including the use of the optional wildcard character) to display a subset of money actions in the current case.

The Financial Information page (page 8) allows you to view financial transactions within the specified case(s) retrieved by this form's database query. This page displays the following information concerning each money action in the current case: case serial number, action date, action code, action description, accounting advice receipt number, money amount, and the total money amount received for the case.

Up to ten financial actions are displayed in order by action date. If the current case contains more than ten financial actions, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to other money actions not currently displayed.

The Enter a New Option field contains a default value of 9, the next consecutive page number.

You may enter and execute queries, based on parameters entered in the financial action fields, to selectively display a subset of the financial action records within the current case.



Review and discuss geographic names and the structure of the Geographic Name Information page.

The Geographic Name Information page (page 9) allows you to view geographic names associated with the specified case(s) retrieved by this form's database query. This page displays the current case serial number and all geographic names related to the case.

Demonstrate how to scroll to additional geographic names.

Up to 12 geographic names are displayed in alphabetical order. If the current case is linked to more than 12 geographic names, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to names not currently displayed.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of geographic names in the current case.

The Enter a New Option field contains a default value of 10, the next consecutive page number.

You may enter and execute queries, based on parameters entered in the geographic name field, to selectively display a subset of the geographic names associated with the current case.

Review and discuss general remarks and the structure of the General Remarks Information page.

The General Remarks Information page (page 10) allows you to view general remarks recorded for the specified case(s) retrieved by this form's database query. This page displays the current case serial number and all general remarks related to the case.

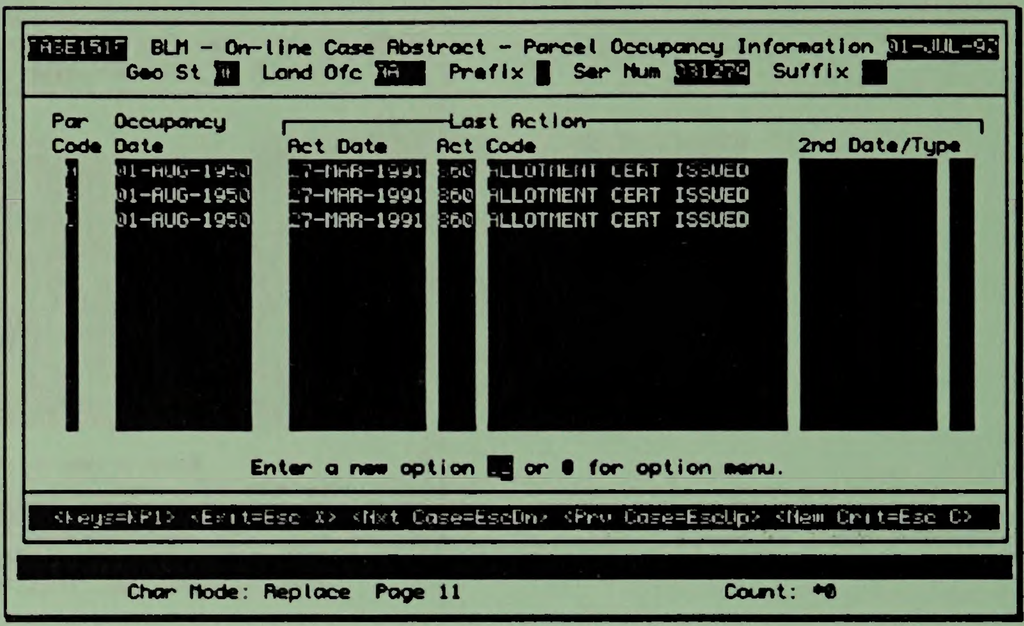
Demonstrate how to scroll to additional remarks.

Up to 11 general remarks are displayed in the order in which they were entered for the case. If the case contains more than 11 lines of general remarks, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to remarks not currently displayed.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of remarks in the current case.

The Enter a New Option field contains a default value of 11, the next consecutive page number.

You may enter and execute queries, based on parameters entered in the general remarks field, to selectively display a subset of the general remarks recorded for the current case.



Review and discuss each data element on the Parcel Occupancy Information page.

The Parcel Occupancy Information page (page 11) allows you to view occupancy information and latest action data pertaining to parcels within Alaska Native Allotment case(s) retrieved by this form's database query.

Emphasize that this page only displays data for Alaska Native Allotment cases.

NOTE:

Only Alaska Native Allotment cases (case type 256100) contain parcel occupancy data.

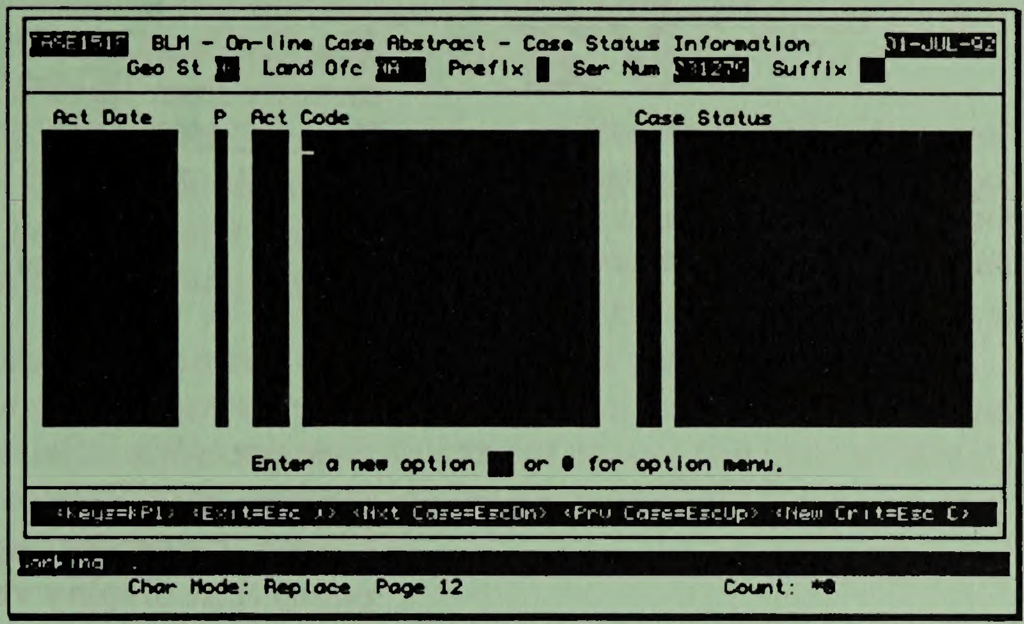
This page displays the following data for each parcel in the current case: case serial number, parcel code, occupancy date, and the action date, code, description, second date and second date type of the last action affecting the native allotment parcel.

Demonstrate how to scroll to additional parcel information.

Data for up to ten parcels are displayed in order by occupancy date. If the current case contains more than ten parcels, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to the additional parcel information.

Review use of the Enter a New Option field and explain that queries cannot be executed on this page.

The Enter a New Option field contains a default value of 12, the next consecutive page number. You may not enter and execute queries on this page.



Review and discuss each of the data elements on the Case Status Information page.

Emphasize that only actions that have automatically set case status are displayed.

The Case Status Information page (page 12) allows you to view actions that have automatically set case status in the specified case(s) retrieved by this form's database query. This page displays the following action and case data: case serial number, action date, action code and description, and case status and description.

Demonstrate how to scroll to additional status-setting actions

Up to 12 actions that have set case status in the current case are displayed in order by action date. If the case contains more than 12 status-setting actions, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to the actions not currently displayed.

The Enter a New Option field contains a default value of 1, the next consecutive page number.

Mention that the default Option Number loops users back to page 1 of the form.

NOTE:

The default option number returns you to the first case information page (Case Header Information page) listed on the Retrieval Options page.

Demonstrate and discuss entering and executing a query (including use of the optional wildcard character) to display a subset of status-setting action in the current case.

You may enter and execute queries, based on parameters entered in the action and case status fields, to selectively display a subset of the status-setting actions within the current case.

Review the Quirks subsection point by point with the class and briefly summarize the use of the On-Line Case Abstract form.

Quirks and special data issues for CASE151F:

- The On-line Case Abstract Form can be accessed directly from the TWPALL/Township Summary Form (CASE150F), FIND - Customer Form (CUST400F), FIND - Document Form (CASE400F), FIND - Claim Name Form (CASE403F), and FIND - Geographic Name Form (CASE404F).

- This form allows you to retrieve and access detailed information for one or more cases in the System. The form contains a Selection Criteria page for specifying the case(s), a Retrieval Options page for navigating among the form's pages, and 12 case information pages that display various types of specific data related to the case(s). The form also allows you to generate Case Abstract output.

- In specifying On-line Case Abstract selection criteria, you are required to enter, at a minimum, one of the following: a single case serial number, case type, mask, case status, survey type, BLM District Office, meridian/township/range, or window. As long as you enter at least one of these types of data on the Selection Criteria page, all other fields are optional.

- You may specify only one of the following three types of data: BLM District, Meridian/Township/Range, or Window. These all limit a query to cases within a specific geographic area. If you attempt to specify more than one type of geographic area, previously entered geographic area selection criteria are cleared automatically from the form. Only one geographic area can be specified at a time.

- This form limits the number of cases that can be retrieved in a database query to 200 because selection criteria not specific enough may cause the System to retrieve more cases than is practical to review on-line. Furthermore, some database queries based upon just one or two criteria may take a long amount of time, tie up your terminal during the query, and cause System performance to deteriorate for everyone.

- In addition to viewing retrieved case data on pages 1 through 12 of this form, you may also write the data to a computer file, output case abstract(s) to a

printer, obtain a count of the number of pages that would be generated for case abstract(s), and screen display case abstract(s).

- If the number of cases retrieved in a database query is zero, no cases in the System meet your selection criteria.
- When you press COMMIT with E in the Queue Type field on the Selection Criteria page, the System generates case abstract output immediately through a batch queue. You cannot cancel the case abstract without logging out the user and batch user on the Prime.
- Using the Select/Deselect procedure on the Retrieval Options page, you can select specific case information pages to view in sequence and automatically skip pages you do not want to see. NEXT/PREVIOUS BLOCK allow you to move among your selected pages.
- The Retrieval Options page allows you to generate a screen display and/or output case abstracts to a printer or file. The data contained in these on- and off-line abstracts reflects any selections you have made using the Select/Deselect procedure. These subsets of case abstracts are called case extracts.
- You may move from one case information page to another by typing the destination page number in the current page's Option Number field. Each page's Option Number field defaults to the next consecutive page number. From any page, you may access the Retrieval Options page directly by pressing CURSOR HOME or typing 0 (zero) in the Option Number field. From any page, you may also return to the Selection Criteria page to enter parameters for another database query by pressing CLEAR FORM.
- If multiple cases are retrieved by the form's database query, you can move from one case to another on any of the 12 case data pages (as well as the Retrieval Options page) using the NEXT/PREVIOUS CASE function keys identified on the legend line.
- You may enter and execute queries on many case information pages to selectively display records within the current case. This process simply allows

you to specify and display a subset of a case's records retrieved during the query initiated from the Selection Criteria page.

- If multiple records in a case are retrieved for a case information page, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll through the records. This is true on all pages, whether they display one record at a time or multiple records.
- Although the Case Land Information - Brief and Action Information pages do not have a labeled Option Number field, the left-most column of their bottom block of fields functions as one. Data displayed in the top blocks on these two pages remains synchronized with the current record in the bottom block.
- Each time you press NEXT/PREVIOUS RECORD on the Case Land Information - Comprehensive page, the form returns momentarily to the Brief Case Land page, retrieves the next or previous land record, then reaccesses the Comprehensive page and displays detailed data for the selected land.
- Although the U.S. Rights Information page lists only the last action linked to the displayed case land in the current case, U.S. rights reserved on the land may be the cumulative result of several different actions in the current case.
- Only Alaska Native Allotment cases (case type 256100) contain data for the Parcel Occupancy Information page.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise B-3 *(On-line Case Abstract).*

FIND - Customer Form (CUST400F)

45 minutes

Review the purpose of the FIND - Customer form. Mention that the On-line Case Abstract form can be accessed directly from this form.

Purpose and use of the FIND - Customer Form:

This form allows you to search for and view customer data and customer-related case data on-line. You may also access the On-line Case Abstract Form (CASE151F) directly from page 3 of this form.

FIND - Customer information includes: customer ID, name, name number, address, address number, serial numbers of cases containing a specified customer, and case/customer associations of specific names and addresses associated with each case.

Review who uses this form and why.

BLM personnel responsible for retrieving customer and customer-related case data using a specific customer name or ID use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CUST400F program name in QXFER:

The FIND - Customer Form (CUST400F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the FIND - Customer option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST400F program name.

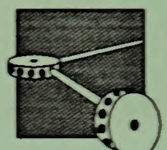
Discuss data required to use this form, emphasizing the extensive query capabilities available.

Required Data you must have to use this form:

- Customer Name (or a portion of a name) and Customer Address (or some idea of the appropriate address)

NOTE:

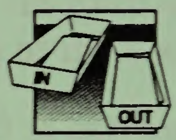
This form gives you a great deal of flexibility to query the database and retrieve customer and customer-related case data. An exact customer name and address is not necessary to use the form, and you do not need to know the customer ID. The more you know about the specific customer name and address you are interested in, however, the faster your FIND process will be.



Review the form's basic structure and the types of data that can be entered and retrieved on its various pages.

Structure of form:

The FIND - Customer Form consists of four pages. Page 1 allows you to query the System for customer names and display customer name and ID data. For the customer name/ID/name number combination selected on page 1, page 2 displays all the address data associated with the customer ID. For the customer ID/name number/address number selected on pages 1 and 2, page 3 displays all the case serial numbers, along with related case type and status data, containing the specified customer. The On-line Case Abstract Form can only be accessed from page 3. Page 4 displays detailed case-customer data for the serial number(s) displayed on page 3.



Review the step-by-step workflow for the FIND - Customer form.

Use the available training aids as needed.

Workflow within this form and a review of the form's pages and fields:

NOTE:

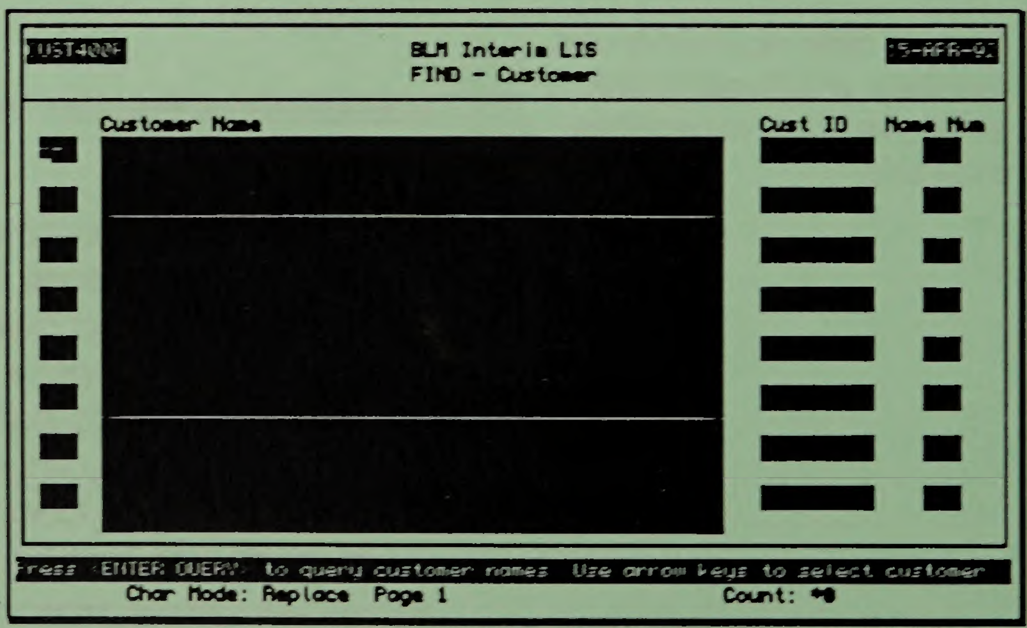
To retrieve a list of cases containing a customer for whom you already know the customer ID, name (or name number) and address (or address number), continue directly to page 3 of this form by pressing NEXT BLOCK or NEXT FIELD.

STEP 1

Mention the option of moving directly to page 3 if customer data are known.

Demonstrate and discuss entering and executing a query to find customer name(s).

Page 1 allows you to enter customer name selection criteria and execute a query to retrieve customer data. To enter query selection criteria, press ENTER QUERY.



Demonstrate the use of the optional query wildcard character.

You can specify the customer name, ID or name number as selection criteria. Type your query parameters in the appropriate fields. Because you can use the query wildcard character %, you do not need to know the full name of the customer for which you are searching Press EXECUTE QUERY to query the System for customers that match your selection criteria.

The System retrieves all of the customer names, as well as their associated customer ID's and name numbers, that meet the query criteria entered. Scroll through the retrieved names using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, and move the pointing arrow on the left of the page up and down.

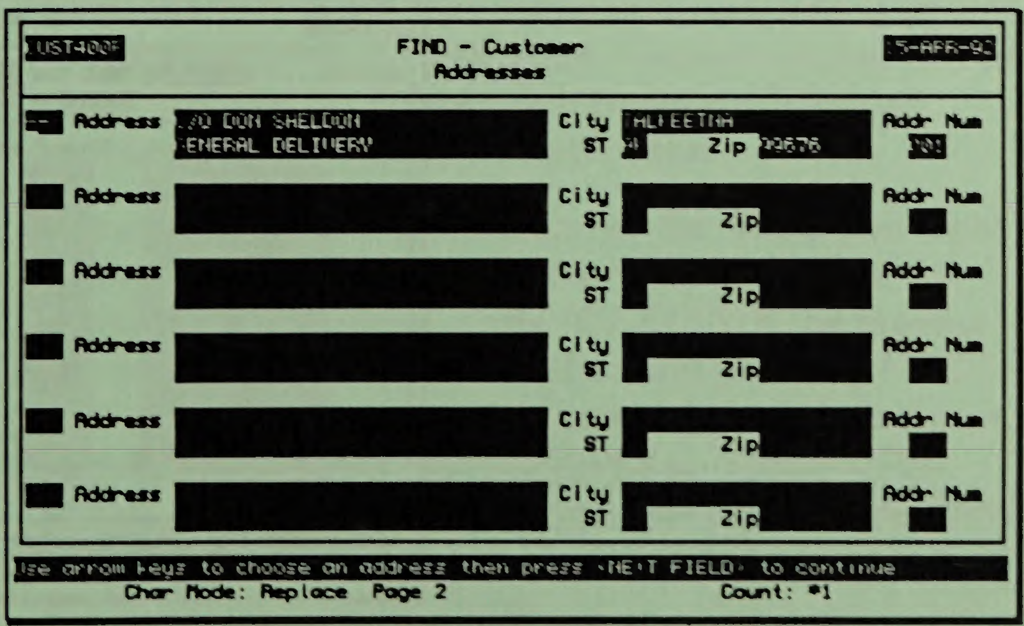
Mention that all name numbers for retrieved ID's may not appear on this page.

NOTE:
When you query by customer name, all name numbers for the retrieved customer ID(s) may not appear on this page.

When you move the arrow to the appropriate customer name, press NEXT FIELD to move to page 2 and retrieve all the addresses associated with this name's customer ID.

STEP 2

Page 2 displays the address(es) and address number(s) associated with the customer ID selected on page 1.



Briefly describe how one customer ID may contain multiple names and addresses and how names and addresses are not directly tied to one another.

Refer to the Interim System Customer Table wall display.

NOTE:

The System links the customer name and customer address to the customer ID independently of one another, allowing different combinations of names and addresses with the same ID in different cases.

If more than one address is retrieved, scroll through these using NEXT/PREVIOUS RECORD and NEXT/ PREVIOUS SET, and to move the pointing arrow on the left of the page up and down. When you locate the appropriate address, press NEXT FIELD to move to page 3 and obtain a list of case serial numbers associated with the selected customer ID/name number/ address number combination.

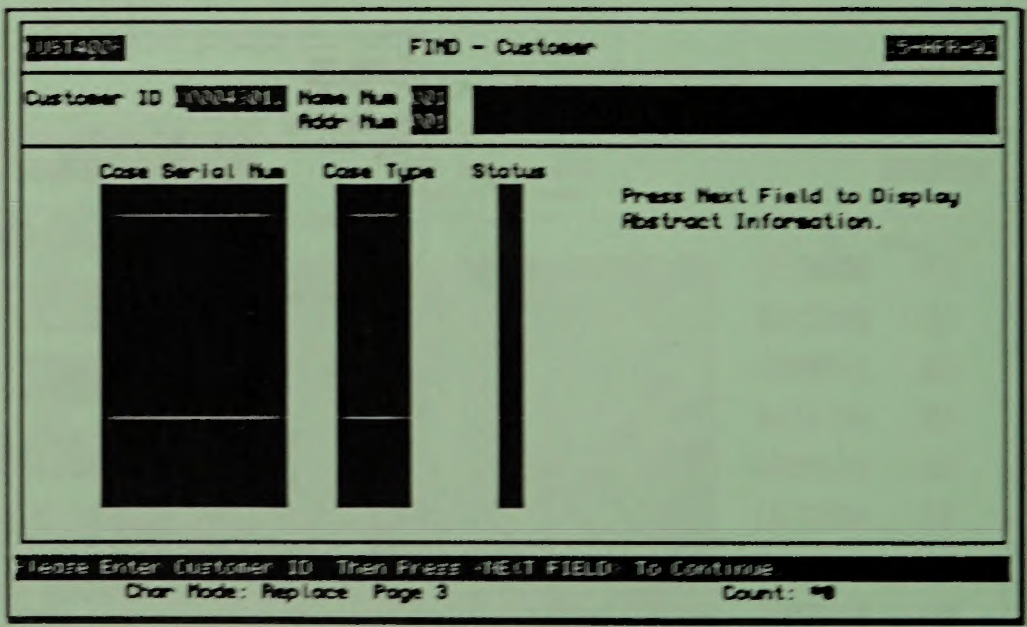
Demonstrate entering and executing a query to find a customer address within the selected ID.

You may enter and execute queries, based on parameters entered on this page, to selectively display a subset of the addresses associated with the customer ID selected on page 1. Only do this if the number of retrieved addresses is excessive, prohibiting scrolling.

If you want to return to page 1 to select a different customer name or enter another name query, press PREVIOUS FIELD or PREVIOUS BLOCK.

STEP 3

Use page 3 to retrieve a list of case serial numbers containing a specified customer ID/name number/ address number combination.



Review the structure, purpose and use of page 3.

This page is divided into two blocks of fields. The upper block displays customer ID, name number and address number information. If you selected a name and address on pages 1 and 2, these are carried forward to page 3, as well as the appropriate customer ID. If no customer ID, name number and address number appear in the upper block, or if you want to replace previously selected values, enter the desired values in the appropriate fields. If the Name Number and/or Address Number fields are left blank (use CLEAR FIELD, if needed), all names and/or addresses within the specified customer ID are used as search criteria for the retrieval of case serial numbers.

Mention that leaving the Name and Address Number fields blank retrieves cases for all names and addresses within the ID.

The lower block on this page displays the serial numbers of cases containing the customer specified by the customer ID, name number and address number combination displayed in the upper block of fields. Before displaying case data, the System prints a message at the bottom of the page indicating how many case serial numbers exist for the customer. If the number of cases retrieved is zero, no case in the database contains the specified customer ID/name number and address number combination. In addition to case serial numbers, the System retrieves and displays associated case type and case status data in the lower block of fields. Scroll through the retrieved cases using NEXT/PREVIOUS RECORD and NEXT/ PREVIOUS SET. You may not edit or update data in the lower section of the form.

Describe entering and executing a query to display a subset of the retrieved cases.

You may enter and execute queries, based on parameters entered in the case serial number, case type and case status fields, to selectively display a subset of the cases containing the specified customer ID/name number/address number combination.

Discuss and demonstrate how to access and return from the On-line Case Abstract form.

If you locate a case serial number for which you want to view additional information, you may access the On-line Case Abstract Form (CASE151F) by moving the cursor to that serial number and pressing NEXT FIELD. The System carries forward the selected case serial number onto the On-line Case Abstract Retrieval Options page. When you exit the On-line Case Abstract Form, you automatically return to page 3 of the FIND - Customer Form.

Review how to access page 4 and how to return to previous pages.

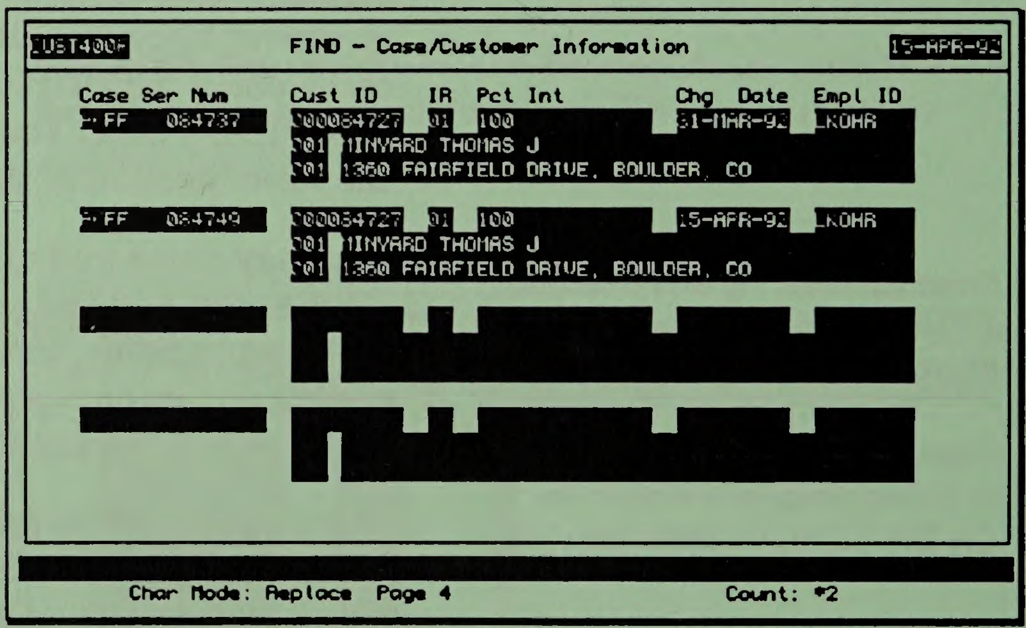
Press NEXT BLOCK to access page 4 of the FIND - Customer Form and view detailed customer information on the specified customer ID/name number/ address number combination within each of the cases listed on page 3.

NOTE:
To move back and forth among the pages of this form, use NEXT/PREVIOUS BLOCK.

STEP 4

Page 4 of this form displays detailed information concerning the specified customer ID/name number/ address number combination for the cases listed on page 3. Cases are listed in the same order as on page 3. The following case-customer data is displayed on page 4 for each case: serial number, customer ID, interest relationship, percent interest, change date (i.e., the last date this customer's data within the case was updated), employee ID (i.e., the employee who made the update), name, name number, address and address number.

Briefly review the data elements on page 4.



This page displays information for four cases simultaneously. If more than four serial numbers appeared on page 3, use NEXT/PREVIOUS RECORD and NEXT/ PREVIOUS SET to scroll to the additional cases.

Describe entering and executing queries on page 4.

You may enter and execute queries using parameters entered in all the fields on this page (except the Customer ID, Name and Address fields) to search the database for additional case-customer information for the specified customer ID.

To return to page 3, press PREVIOUS FIELD or PREVIOUS BLOCK. To return to page 1, press NEXT BLOCK.

Quirks and special data issues for CUST400F:

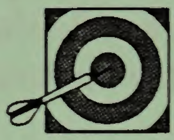
Review the Quirks subsection point by point and briefly summarize the use of the FIND - Customer form.

- This form gives you a great deal of flexibility to query the database and retrieve customer and customer-related case data. An exact customer name and address is not necessary to use the form, and you do not need to know the customer ID. The more you know about the specific customer name and address you are interested in, however, the faster your FIND process will be.
- Page 1 of this form requires you to enter and execute a query to retrieve customer name and ID information. Once you have entered a customer name/ID query on page 1, no other specific queries are necessary for using the form. You can, however, enter and execute queries on all four pages of the form.
- The System links a customer name and a customer address to a customer ID independently of one another, allowing different combinations of names and addresses within the same customer ID in different cases, as needed.
- Move back and forth among the pages of this form by using NEXT/PREVIOUS BLOCK.
- This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case serial number displayed on page 3 and retrieve all the case information for a case serial number containing the customer specified on page 3.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise B-4** (FIND - Customer)*

FIND - Document Form (CASE400F)



20 Minutes

Review the purpose of the FIND - Document form.

Review who uses this form and why.

Purpose and use of the FIND - Document Form:

This form allows you to search and view case and case land information related to a specified document type and number. The form displays case serial numbers, case types, case status codes/descriptions, as well as case land data linked to the specified document.

BLM personnel responsible for retrieving case and case land information using a specific document type and number use this form to perform their task.

Describe the interconnection among data retrieval forms. Refer to the System Map.

NOTE:

This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any displayed case serial number and retrieve all the case information for a serial number containing the specified document.

Review navigation to this form (including QXFER).

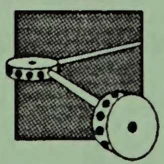
Discuss data required to use this form.

Navigation to this form and use of CASE400F program name in QXFER:

The FIND - Document Form (CASE400F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the FIND - Document option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE400F program name.

Required Data you must have to use this form:

- Document Type and Document Number

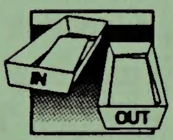


Review this form's basic structure and the types of data input/ output on its two pages.

Structure of form:

The FIND - Document Form consists of two pages. Page 1 contains fields that allow you to enter document criteria for querying the Interim System database, display case data retrieved by that query, and allow you to enter and execute queries to selectively display a subset of the cases containing the specified document.

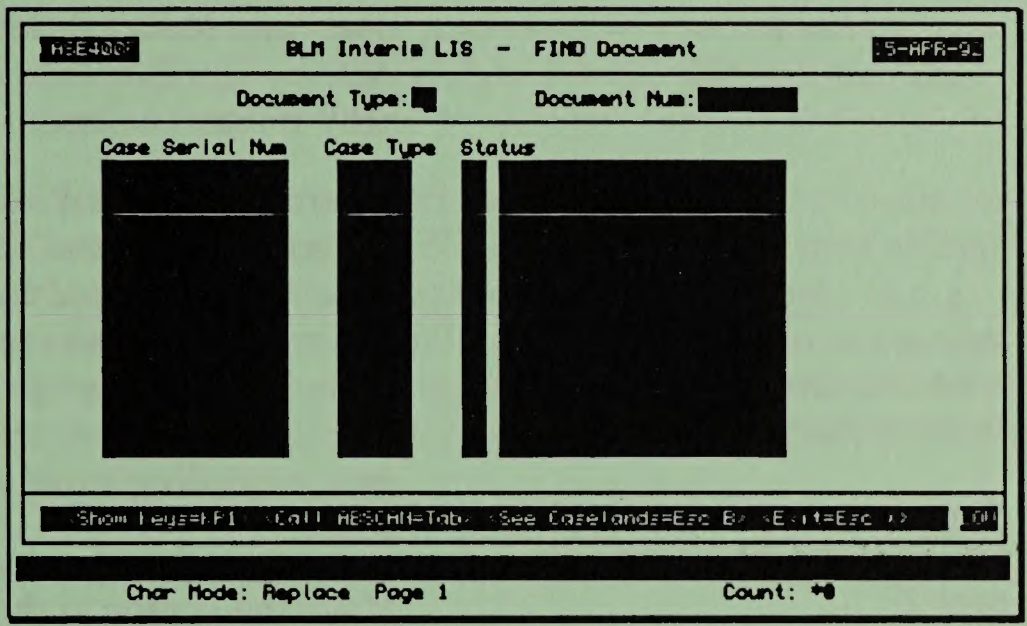
Page 2 contains fields that display the action number(s) of the action(s) in a selected case containing the specified document, as well as basic case land data for all lands in the case linked to the displayed action number. You may enter and execute queries to select a specific action containing the specified document in the selected case or to selectively display a subset of the case land records linked to the displayed action.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the FIND - Document form.

Use the available training aids as needed.



STEP 1

Enter the document type and number in the fields at the top of page 1 that specify the unique document to be searched for in the database. Use the List of Values (LOV), if necessary. Since the Document Number field does not automatically zero-fill, enter leading zeros as needed. Press NEXT FIELD after entering a document number to retrieve all case serial numbers linked to the document. These serial numbers are displayed, along with their associated case type and case status, in the fields in the main section of page 1.

Demonstrate LOV in the Document Type field.

Mention that leading zeros may be needed in the Document Number field and that NEXT FIELD executes the query for cases.

If the number of cases retrieved by the query is zero, no case in the Interim System database contains the specified document.

Explain that document data resides within individual action records in cases and that this form retrieves both case serial numbers and actions containing the specified document.

NOTE:
Document Type and Number data are stored in individual action records within cases.

STEP 2

Demonstrate how to enter and execute a query to display a subset of retrieved cases.

Demonstrate how to access and return from the On-line Case Abstract form.

You may scroll through the retrieved cases by using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, but you may not edit or update data in the lower block of fields on page 1. You may enter and execute queries, based on parameters entered in the available fields, to selectively display a subset of the cases containing the specified document.

If you locate a case for which you want to view additional information, you can access the On-line Case Abstract Form directly by moving the cursor to that case and pressing NEXT FIELD. The System carries forward the selected case serial number onto the On-line Case Abstract Retrieval Options page. When you exit the On-line Case Abstract Form, you automatically return to page 1 of the FIND - Document Form.

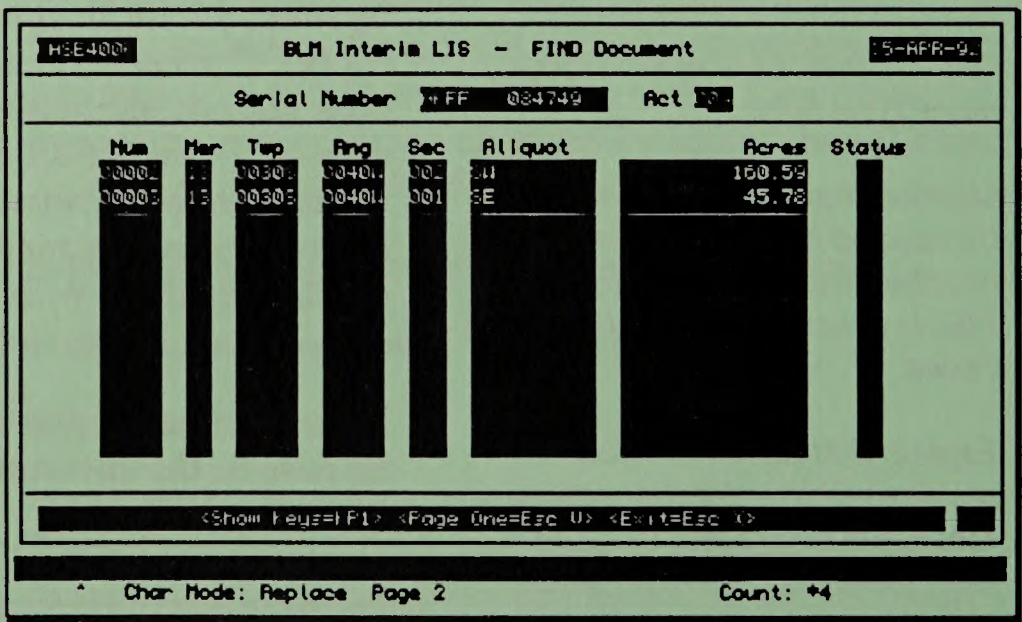
STEP 3

Explain that more than one action in a case can contain the specified document.

Emphasize that information for only one case is displayed on page 2.

For any case serial number listed on page 1, you may access page 2 of the form for action and case land information related to the specified document. Since one or more action records in a case may contain the same document, page 2 allows you to view the action number(s) of these action(s), one at a time, as well as data regarding case lands linked to the displayed action.

Move the cursor to the appropriate case serial number on page 1, and press NEXT BLOCK. The cursor moves to the Action Number field in the top block on page 2.



Demonstrate how to access page 2 and discuss how to scroll through multiple actions in a case if more than one action contains the document.

The selected case serial number and the lowest numbered action record in the case containing the specified document appear in the top block of fields. If land record(s) in the case are linked to this action, data concerning these appears in the lower block of fields.

Mention that users can enter and execute queries in the Action Number field to retrieve a specific action number in the case.

If more than one action in the case contains the document specified on page 1, you can scroll through the action numbers using NEXT/PREVIOUS RECORD. As you scroll through the actions, data for case lands linked to the displayed action appear in the lower block. If no action to land ties exist for the displayed action, no case land data are displayed in the lower block. You may enter and execute queries in the Action Number field to retrieve specific action numbers, if desired.

Discuss how to access the case land block as well as how to enter and execute queries to display a subset of lands linked to the current action.

To access the case land block from the Action Number field on page 2, press NEXT BLOCK. You may either scroll through the retrieved case land records using NEXT/PREVIOUS SET, or enter and execute queries, based on parameters entered in the available fields, to selectively display a subset of the lands linked to the displayed action.

NOTE:
The NEXT/PREVIOUS RECORD keys are not available in the case land block on page 2 of this form.
To move back and forth among the blocks and pages of this form, use NEXT/PREVIOUS BLOCK.

Review and discuss the Quirks subsection with the class point by point and briefly summarize the use of the FIND - Document form.

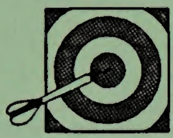
Quirks and special data issues for CASE400F:

- If the number of cases retrieved by a FIND - Document query is zero, no case in the Interim System contains the document specified in the fields at the top of page 1.
- You may enter and execute queries to selectively display cases retrieved by the initial FIND - Document database query on page 1. This simply allows you to select and display a subset of the cases originally retrieved.

- Page 1 of this form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case displayed, and retrieve all the case information for a case serial number containing the specified document.
- For any case selected on page 1, page 2 displays action and case land information related to the specified document. Since one or more action records in a case may contain the same document, page 2 allows you to view the action number(s) of these action(s), one at a time, as well as data regarding case lands linked to the displayed action.
- You may enter and execute queries in the Action Number field on page 2 to select a specific action in a case that contains the specified document. You may also enter and execute queries in the case land block on page 2 to selectively display a subset of the lands linked to the displayed action.
- To move back and forth among the blocks and pages of this form, use NEXT/PREVIOUS BLOCK.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

FIND - Claim Name Form (CASE403F)



15 minutes

Review the purpose of the FIND - Claim Name form.

Review who uses this form and why.

Describe the interconnection among data retrieval forms. Refer to the System Map.

Purpose and use of the FIND - Claim Name Form:

This form allows you to search for and view case information related to a specified claim name. The form displays case serial numbers, case types and case status codes.

BLM personnel responsible for retrieving case information using a specific claim name use this form to perform their task.

NOTE:
This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any displayed case serial number and retrieve all the case information for a serial number containing the specified claim name.

Review navigation to this form (including QXFER).

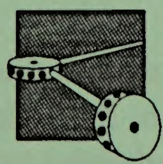
Discuss data required to use this form.

Navigation to this form and use of CASE403F program name in QXFER:

The FIND - Claim Name Form (CASE403F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the FIND - Claim Name option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE403F program name.

Required Data you must have to use this form:

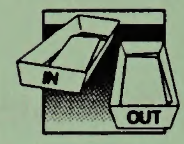
- Claim Name (or a portion of a Claim Name)



Review the form's structure and the types of data input/output.

Structure of form:

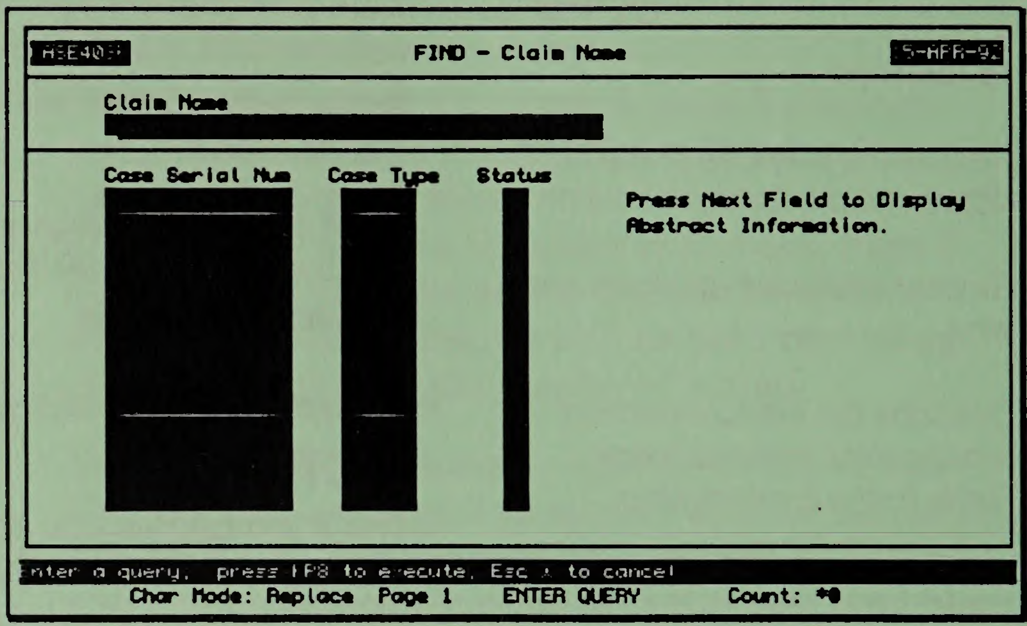
The FIND - Claim Name Form consists of one page containing fields that allow you to enter claim name criteria for querying the Interim System database, display case data retrieved by that query, and enter and execute queries to selectively display a subset of the cases containing the specified claim name.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the FIND - Claim Name form.

Use the available training aids as needed.



STEP 1

Enter a claim name or a portion of a claim name in the field at the top of the form. Use the query wildcard character %, as needed. A List of Values (LOV) is not available on this form. Your entry specifies the unique claim name, or portion of a name, to be searched for in the database

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) for retrieving claim names.

Press EXECUTE QUERY to retrieve all claim names that meet your query criteria. Only one claim name appears on the form at a time. If more than one claim name matches your query criteria, use NEXT/PREVIOUS RECORD to scroll through them. If no claim name in the database matches your criteria, a message appears on the message line, and you will need to reenter different query criteria.

When you locate the appropriate claim name, press NEXT FIELD or NEXT BLOCK and move to the large lower block on the form.

Demonstrate how NEXT FIELD or NEXT BLOCK allows access to the lower block and executes the query for cases.

The System retrieves the serial numbers of cases containing the claim name, and displays these numbers, along with associated case types and case statuses, in the fields of the lower block.

Press NEXT/PREVIOUS BLOCK to move back and forth, as needed, between the case information block and the claim name block until you locate the case serial number(s) you want.

Mention that claim names are stored in case header records.

NOTE:
Claim name data is stored in case header records within cases.

STEP 2

You may scroll through the retrieved case data by using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, but you may not edit or update data in the lower block of fields.

Demonstrate how to enter and execute a query to display a subset of the retrieved cases.

You may enter and execute queries, based on parameters entered in the case serial number, case type and case status fields, to selectively display a subset of the cases containing the specified claim name.

Demonstrate how to access and return from the On-line Case Abstract form.

If you locate a case for which you want to view additional information, you can access the On-line Case Abstract Form directly by moving the cursor to that case serial number and pressing NEXT FIELD. The System carries forward the selected case serial number onto the On-line Case Abstract Retrieval Options page. When you exit the On-line Case Abstract Form, you automatically return to the FIND - Claim Name Form.

Review the Quirks subsection point by point and briefly summarize the use of the FIND - Claim Name form.

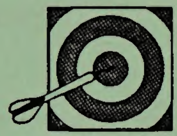
Quirks and special data issues for CASE403F:

- Two database queries are performed on this form. In the first block, you search the database for a claim name(s) that matches your query criteria. In the second block, you retrieve the serial numbers of all the cases in the System that contain the selected claim name.
- If you do not know the exact spelling or format of the claim name, use the query wildcard character, %, in the Claim Name field. If more than one claim name is retrieved by the query, scroll through the names in the Claim Name field using NEXT/PREVIOUS RECORD. Use NEXT/PREVIOUS BLOCK to move back and forth, as needed, between the case information block and the claim name block until you locate the case serial number(s) you want.
- You may enter and execute queries to selectively display cases retrieved by the initial FIND - Claim Name database query. This process simply allows you to select and display a subset of the cases originally retrieved.

* This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case displayed and retrieve all the case information for a case serial number containing the specified claim name.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

FIND - Geographic Name Form (CASE404F)



10 minutes

Review the purpose of the FIND - Geographic Name form.

Review who uses this form and why.

Describe the interconnection among data retrieval forms. Refer to the System Map.

Purpose and use of the FIND - Geographic Name Form:

This form allows you to search for and view case information related to a specified geographic name. The form displays case serial numbers, case types and case status codes.

BLM personnel responsible for retrieving case information using a specific geographic name use this form to perform their task.

NOTE:

This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any displayed case serial number and retrieve all the case information for a serial number containing the specified geographic name.

Review navigation to this form (include QXFER).

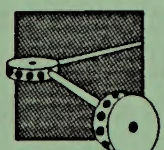
Discuss the data required to use this form.

Navigation to this form and use of CASE404F program name in QXFER:

The FIND - Geographic Name Form (CASE404F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the FIND - Geo Name option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE404F program name.

Required Data you must have to use this form:

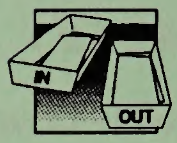
- Geographic Name (or a portion of a Geographic Name)



Review this form's structure and the types of data input/output.

Structure of form:

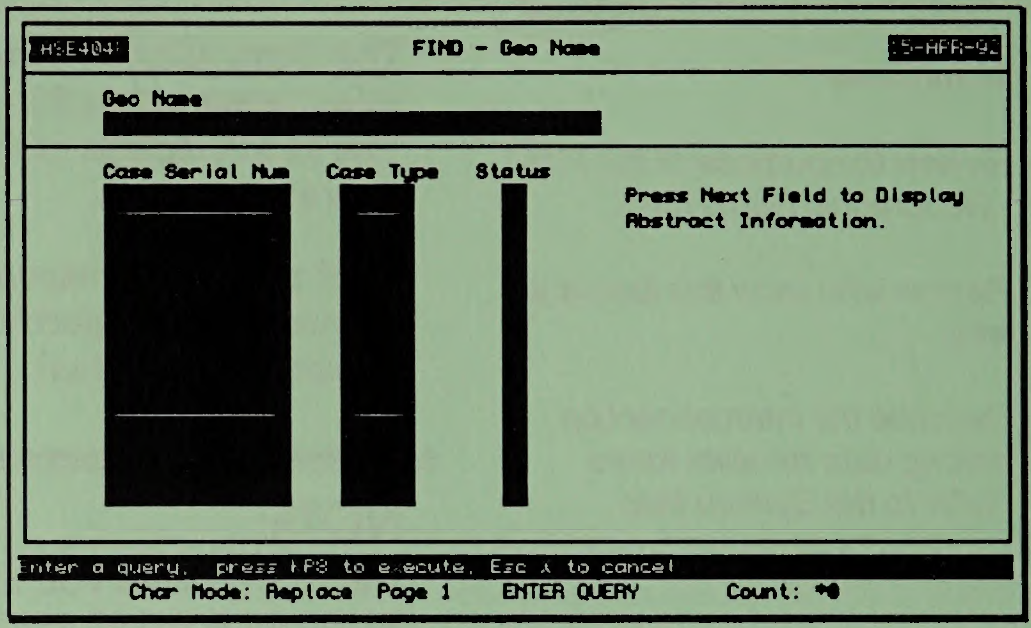
The FIND - Geographic Name Form consists of one page containing fields that allow you to enter geographic name criteria for querying the Interim System database, display case data retrieved by that query, and enter and execute queries to selectively display a subset of the cases containing the specified geographic name.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the FIND - Geographic Name form.

Use the available training aids as needed.



STEP 1

Enter a geographic name or a portion of a geographic name in the field at the top of the form. Use the query wildcard character, %, as needed. A List of Values (LOV) is not available on this form. Your entry specifies the unique geographic name, or portion of a name, to be searched for in the database.

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) for retrieving geographic names.

Press EXECUTE QUERY to retrieve all geographic names that meet your query criteria. Only one geographic name appears on the form at a time. If more than one geographic name matches your query criteria, use NEXT/PREVIOUS RECORD to scroll through them. If no geographic name in the database matches your criteria, a message appears on the message line, and you will need to reenter different query criteria.

When you locate the appropriate geographic name, press NEXT FIELD or NEXT BLOCK and move to the large lower block on the form.

Demonstrate how NEXT FIELD and NEXT BLOCK allows access to the lower block and executes the query for cases.

The System retrieves the serial numbers of cases containing the geographic name, and displays these serial numbers, along with associated case types and case statuses, in the fields of the lower block.

Use NEXT/PREVIOUS BLOCK to move back and forth, as needed, between the case information block and the geographic name block until you locate the case serial number(s) you want.

Mention that geographic names are stored within geographic name records within cases.

NOTE:
Geographic name data is stored in individual geographic name records within cases.

STEP 2

You may scroll through the retrieved case data using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, but you may not edit or update data in the lower block of fields.

Demonstrate how to enter and execute a query to display a subset of the retrieved cases.

You may enter and execute queries, based on parameters entered in the case serial number, case type and case status fields, to selectively display a subset of the cases containing the specified geographic name.

Demonstrate how to access and return from the On-line Case Abstract form.

If you locate a case for which you want to view additional information, you can access the On-line Case Abstract Form directly by moving the cursor to that case serial number and pressing NEXT FIELD. The System carries forward the selected case serial number onto the On-line Case Abstract Retrieval Options page. When you exit the On-line Case Abstract Form, you automatically return to the FIND - Geographic Name Form.

Review the Quirks subsection point by point and briefly summarize the use of the FIND - Geographic Name form.

Quirks and special data issues for CASE404F:

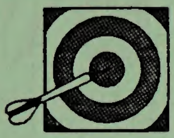
- Two database queries are performed on this form. In the first block, you search the database for a geographic name(s) that matches your query criteria. In the second block, you retrieve the serial numbers of all the cases in the System that contain the selected geographic name.
- If you do not know the exact spelling or format of the geographic name, use the query wildcard character, %, in the Geographic Name field. If more than one geographic name is retrieved by the query, scroll through the names in the Geographic Name field using NEXT/PREVIOUS RECORD. Use NEXT/PREVIOUS BLOCK to move back and forth, as needed, between the case information block and the geographic name block until you locate the case serial number(s) you want.

- You may enter and execute queries to selectively display cases retrieved by the initial FIND - Geographic Name database query. This process simply allows you to select and display a subset of the cases originally retrieved.
- This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case displayed and retrieve all the case information for a case serial number containing the specified geographic name.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise B-5** (FIND - Document, FIND - Claim Name, FIND - Geographic Name).*

Valid Action Code Form (DICT107F)



10 minutes

Review the purpose of the Valid Action Code form.

Purpose and use of the Valid Action Code Form:

This form allows you to view and query valid BLM action codes and data related to them. All action codes on this form appear unrelated to case type usage. Refer to the Valid Case Type/Action Code Form (DICT103F) to verify usage of a particular action code with a specific case type.

Review who uses this form and why.

BLM personnel responsible for retrieving action code information for validation purposes use this form to perform their task.

Emphasize that this form simply allows users to look up valid action codes used by the BLM in their respective state.

NOTE:

This form only displays action code data for validation and verification purposes. You may not alter or update information in any field on the form.

Review navigation to this form (especially QXFER).

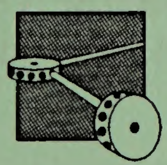
Navigation to this form and use of DICT107F program name in QXFER:

The Valid Action Code Form (DICT107F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the Valid Action Codes option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the DICT107F program name.

Mention that no data are required to use this form.

Required Data you must have to use this form:

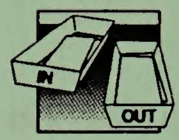
- No specific data is required for using this form.



Review this form's basic structure and the types of data displayed.

Structure of form:

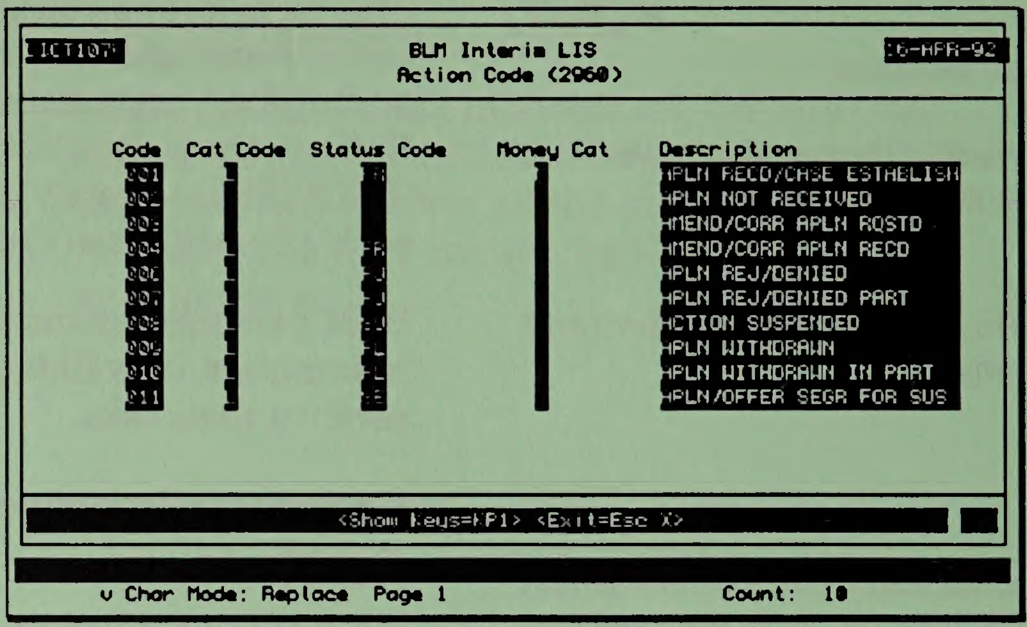
The Valid Action Code Form consists of one page containing fields that display action code information and allow you to enter and execute queries to selectively display a subset of the action codes used by the BLM.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Valid Action Code form.

Use the available training aids as needed.



STEP 1

Explain the information displayed in each field of the form.

After selecting this form from the Data Retrieval Functions Menu, all valid action code information in the System is retrieved. Action codes are displayed in numerical order, beginning with `001`, and each action code's information is listed in a single record on the form.

There are five fields for each action code record:

- Action Code
- Category Code (an `L` indicates land actions)
- Status Code (indicates the land status automatically set for case lands tied to land actions)
- Money Category (an `M` indicates money actions)
- Action Code Description

Scroll through the valid action code records using NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET; you may neither edit nor update data in the form's fields.

STEP 2

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) for retrieving a subset of the action codes used by the BLM in your state.

You may enter and execute queries, based on parameters entered in the available fields, to selectively display a subset of the action codes used by the BLM. Use the query wildcard character, `%`, as needed.

Review the Quirks subsection point by point and briefly summarize the use of the Valid Action Code form.

Quirks and special data issues for DICT107F:

- This form only displays action code data for validation and verification purposes. The form's primary function is to allow the entry and execution of queries for rapid retrieval of valid action code data. You may not alter or update retrieved information in any field on the form.

- All action codes on this form appear unrelated to case type usage. Refer to the Valid Case Type/Action Code Form (DICT103F) to verify usage of a particular action code with a specific case type.

- An L in the Category Code field indicates that an action can be tied to case lands in a case, automatically setting the land status of related case lands; the Status Code field indicates this land status. An M in the Money Category field identifies actions that allow the entry of a money amount in the action record.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Valid Case Type Form (DICT102F)

10 minutes

Review the purpose of the Valid Case Type form.

Review who uses this form and why.

Emphasize that this form simply allows users to look up valid case types used by the BLM in their respective state.

Purpose and use of the Valid Case Type Form:

This form allows you to view and query valid BLM case type codes used in the Interim System.

BLM personnel responsible for retrieving case type information for validation purposes use this form to perform their task.

NOTE:
This form only displays case type data for validation and verification purposes. You may not alter or update information in any field on the form.

Review navigation to this form (including QXFER).

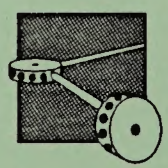
Mention that no data are required to use this form.

Navigation to this form and use of DICT102F program name in QXFER:

The Valid Case Type Form (DICT102F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the Valid Case Type Codes option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the DICT102F program name.

Required Data you must have to use this form:

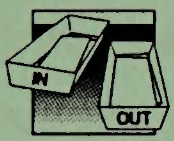
- No specific data is required for using this form.



Review this form's basic structure and the types of data displayed.

Structure of form:

The Valid Case Type Form consists of one page containing fields that display case type information and allow you to enter and execute queries to selectively display a subset of the case type codes used by the BLM.



Review and demonstrate the step-by-step workflow for the Valid Case Type form.

Use the available training aids as needed.

Workflow within this form and a review of the form's fields:

BLM Interim LIS
Case Type (2961)

Code	Description	Legal
00000	UBLIC LAND (NO ACTION)	YSTEM ASSUMES ALL LAND ORIGINALLY OWNED
000001	AREA-ORIGINAL 13 STATES	RESENT AREA ORIGINAL THIRTEEN STATES
000002	ORTHWEST TERRITORY	ESSIONS TO THE UNITED STATES FROM THE
000003	ORTH CAROLINA-TENNESSEE	ESSION TO THE UNITED STATES ON
000004	LOUISIANA PURCHASE-1803	URCHASED FROM FRANCE ON APRIL 30, 1803
000005	ED RIVER-1818	EDED BY GREAT BRITAIN BY CONVENTION OF
000006	FLORIDA-1822	TREATY WITH SPAIN ON FEBRUARY 22, 1819
000007	TEXAS-1845	EPUBLIC OF TEXAS RECOGNIZED AND ANNEXED
000008	OREGON COMPROMISE-1846	OREGON COMPROMISE WITH GREAT BRITAIN ON
000009	TREATY WITH MEXICO-1848	TREATY WITH MEXICO ON FEBRUARY 2, 1848

<Show Keys=KF1> <Exit=Esc>

v Char Mode: Replace Page 1 Count: 10

STEP 1

After selecting this form from the Data Retrieval Functions Menu, all valid case type information in the System is retrieved. Case type codes are displayed in numerical order, and each case type's information is listed in a single record on the form.

Explain the information displayed in each field.

There are three fields for each case type record:

- Case Type Code
- Case Type Description
- Legal Text (an abbreviation of the official legal description for the case type)

Scroll through the valid case type records using NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET; you may neither edit nor update data in the form's fields.

STEP 2

You may enter and execute queries, based on parameters entered in the available fields, to selectively display a subset of the case type codes used by the BLM. Use the query wildcard character, %, as needed.

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) to display a subset of the case types used by the BLM in your state.

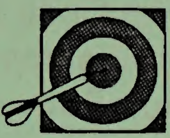
Review the Quirks subsection point by point and briefly summarize the use of the Valid Case Type form.

Quirks and special data issues for DICT102F:

- This form only displays case type data for validation and verification purposes. The form's primary function is to allow the entry and execution of queries for rapid retrieval of valid case type code data. You may not alter or update retrieved information in any field on the form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Valid Case Type/Action Code Form (DICT103F)



20 minutes

Review the purpose of the Valid Case Type/Action Code form.

Purpose and use of the Valid Case Type/Action Code Form:

This form allows you to view and query valid BLM case types, the action codes allowed within each case type, and data related to each case type/action code combination.

Each BLM case type allows only certain action codes, and all action codes displayed on this form are related directly to case type usage.

Review who uses this form and why.

BLM personnel responsible for retrieving case type/action code combination information for validation purposes use this form to perform their task.

Emphasize that this form simply allows users to look up valid action codes by case type used by the BLM in their respective state.

NOTE:

This form only displays case type and action code data for validation and verification purposes. You may not alter or update information in any field on the form.

Review navigation to this form (including QXFER).

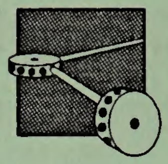
Navigation to this form and use of DICT103F program name in QXFER:

The Valid Case Type/Action Code Form (DICT103F) is an option on the Data Retrieval Functions Menu. It is accessed by choosing the Data Retrieval Functions Menu option from the Interim System Main Menu and then the Valid Case Type/Action Codes option from the Data Retrieval Functions Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the DICT103F program name.

Mention that no data are required to use this form.

Required Data you must have to use this form:

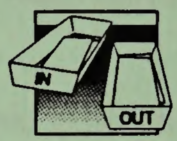
- No specific data is required for using this form.



Structure of form:

Review this form's basic structure and the types of data displayed.

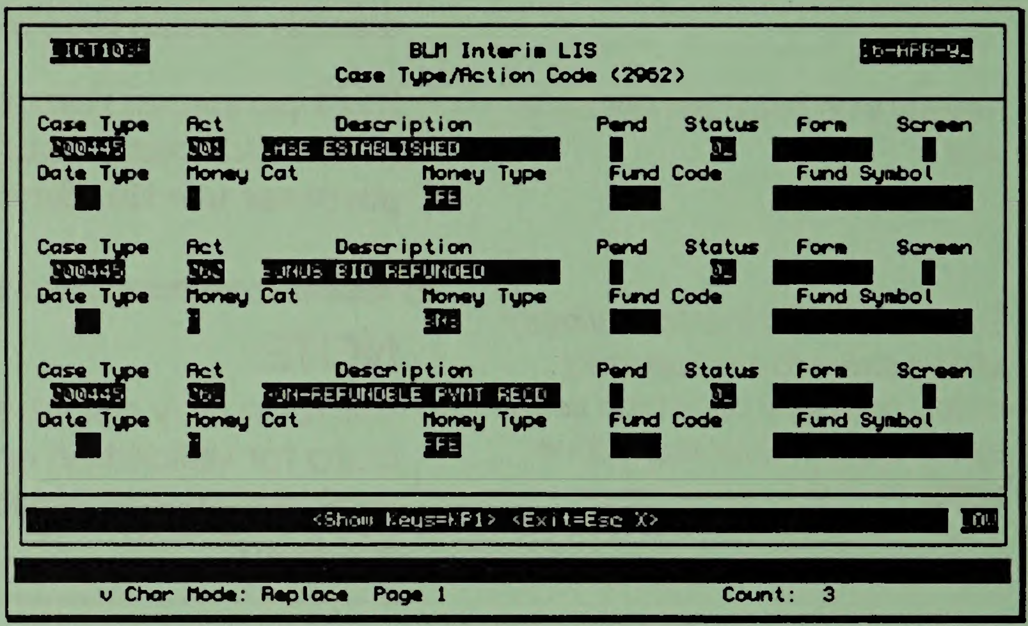
The Valid Case Type/Action Code Form consists of one page containing fields that display case type/action code combination data and allow you to enter and execute queries to selectively display a subset of the case type/action code combinations used by the BLM.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Valid Case Type/Action Code form.

Use the available training aids as needed.



STEP 1

After selecting this form from the Data Retrieval Functions Menu, all valid case type/action code information in the System is retrieved. Case type/action code combinations are displayed in numerical order (by case type code and action code within case type), and each combination's information is listed in a single record on the form.

Explain the information displayed in each field.

There are twelve fields for each case type/action code combination:

- Case Type
- Action Code
- Action Code Description
- Pending Entity (identifies actions that require a pending entity for the given case type)
- Case Status (indicates actions that set case status in the given case type, and the case status code set by the action)

- Form (identifies subsystems within the Interim System that can be accessed for this case type/action code combination)
- Screen (indicates whether using this action code within the given case type results in a default to the comprehensive or brief action page in the B/C field on the brief action page of update and establish action record forms)
- Date Type (identifies actions in the given case type that allow a second date and second date type, and the date type code(s) permitted)
- Money Category (an M indicates money actions within the given case type)
- Money Type (contains the abbreviation for the type of money involved in the transaction associated with a money action in the given case type)
- Fund Code (contains a numeric code for the type of transaction between the BLM and a customer associated with a money action in the given case type)
- Fund Symbol (contains a code reflecting the fund accounting symbol linked to the fund code for monies received associated with a money action in the given case type)

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) for retrieving a subset of case type/action code data used by the BLM in your state.

Scroll through the valid case type/action code records using NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET; you may neither edit nor update data in the form's fields.

STEP 2

You may enter and execute queries, based on parameters entered in the available fields, to selectively display a subset of the case type/action code combinations. Use the query wildcard character, %, as needed.

Review the Quirks subsection point by point and summarize the use of the Valid Case Type/ Action Code form.

Quirks and special data issues for DICT103F:

- This form only displays case type/action code data for validation and verification purposes. The form's primary function is to allow the entry and execution of queries for rapid retrieval of valid case type/action code data. You may not alter or update retrieved information in any field on the form.

- A second date type of `70-MULTIPLE` indicates that you may choose from several or all second date types for the specific action within the given case type.
- An `M` in the Money Category field identifies actions that allow the entry of a money amount in the action record within the given case type.
- Money type, fund code and fund symbol values are recorded in the accounting advice portion of the System, and are linked to appropriate action records within given case types through an accounting advice number.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise B-6** (Valid Action Code, Valid Case Type, and Valid Case Type/Action Code).*

6. Interim System Report Processing

30 minutes
(Interim System Report Processing, Report Forms and Selection Criteria, Features and Fields Common to All Report Forms, Fields Common to Some Report Forms)

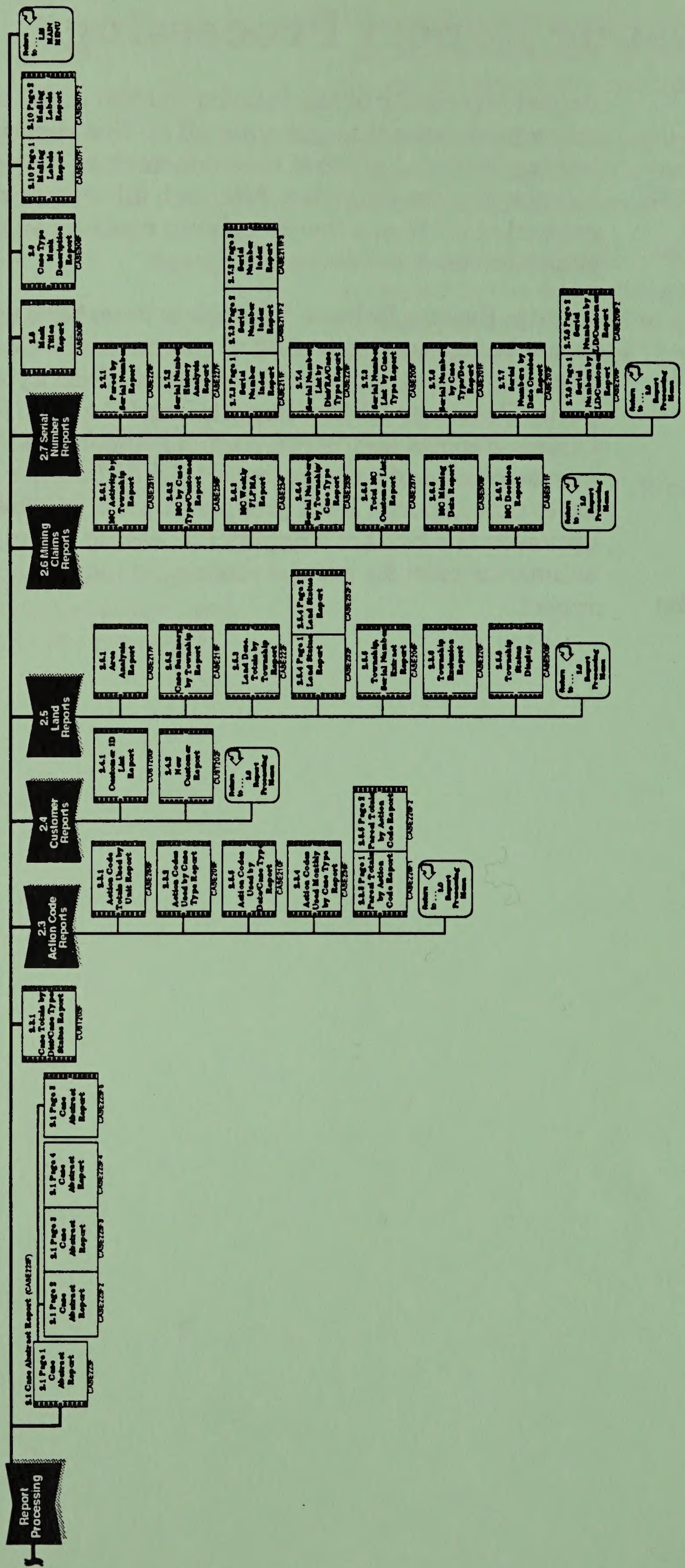
Thoroughly explain what is meant by report processing in the Interim System.

Review the types of reports available and the organization of their request forms in the System.

Refer to the Report Processing portion of the System Map.

Report processing in the Interim System is the set of automated tasks that generate all off-line reports containing land and mineral case information stored in the Interim System database. Although all reports can be generated off-line, a few 80-column reports can also be generated on-line as screen displays.

Interim System Release 1.0 reports have been organized into seven groups according to general topic: Case Abstract Report, Action Code Reports, Case Type Reports, Customer ID List Report, Land Reports, Mining Claims Reports and Serial Number Reports. Some groups consist of only one report, while others contain up to nine reports. Each group of reports is a menu option on the System's Report Processing Menu, and submenus exist for groups containing more than one report.


Report Processing
2.3 Action Code Reports
2.4 Customer Reports
2.5 Land Reports
2.6 Mining Claims Reports
2.7 Serial Number Reports

6.1 Report Forms and Selection Criteria:

Explain that all report forms contain selection criteria fields, and discuss how these criteria help to limit and specify the scope of individual reports.

All report processing forms, whether 1, 2 or more pages long, contain fields that allow you to request reports from the System. Report forms are used primarily to specify selection criteria that help outline, limit and organize the particular data contained in the report's output. Within the set topic, purpose and format of a particular report, selection criteria narrow down the focus of the report by limiting data included to (for example) a specified geographic area (e.g., a township or window), a specified case type or mask, a specified set of action codes, etc....

Discuss the difference between optional and mandatory selection criteria.

Most report forms contain several fields for specifying a variety of selection criteria. On the forms themselves, optional selection criteria are specified by the letters OPT and an arrow (-->) pointing to the optional field(s).

!

WARNING:

Depending on the report you are requesting and the selection criteria specified, some reports may be very large and take a long time to complete. Such reports may also seriously degrade System performance for other users, and your state's Database Administrator may require you to run these reports overnight.

Discuss large reports, their impact on System performance, and running them overnight or on weekends.

In any case, use caution when specifying selection criteria so that you request no more data than you actually need.

6.2 Features and Fields Common to All Report Forms:

Emphasize that Lists of Values are often, but not always, available in report selection criteria fields.

NOTE:
Although Lists of Values (LOV) are available in many fields on most report processing forms, they are not universally available in all fields on all forms. You may need to know the codes and values you wish to enter or use the Data Element Dictionary.

All report processing forms contain two Destination fields and a Queue Type field.

Using any one-page report form as an example, thoroughly discuss and demonstrate the use of the two Destination fields.

Discuss the difference between sending off-line output to a printer and to a computer file.

Explain how to choose a printer, and demonstrate how to use LOV to choose an appropriate printer ID.

The two Destination fields allow you to specify where and how you want a report created. Enter either a P or an F in the first Destination field; the letter P indicates that you want a printout of a report, and the letter F indicates that you want a report's information written to a computer file with no hardcopy output. The second Destination field contains the printer ID for a particular printer in your office and/or state. If a form generates a 132-column printout, the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default printer ID may appear automatically in the second Destination field.

Discuss the different queues available in this state, and how queue types are related to job priorities on the computer.

The Queue Type field indicates into which of the two available Prime Computer job queues a report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when a report will print and its priority within the System. Your state's Database Administrator (DBA) has the option of restricting any report to the Nite queue.

The Express queue prints reports as soon as possible. The Nite queue places report requests in a batch queue for printing reports after office hours, as specified by the Database Administrator.

Warn students about sending reports to the Express queue. Emphasize the difficulties involved in removing jobs from queues. Mention that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

WARNING:

When you press the COMMIT key with `E` in the Queue Type field, the System queries the database and generates a report immediately through a batch queue. You cannot cancel a report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send a report to the Express queue, you may receive a message similar to the following on your terminal:

```
***BATCH_SERVICE (user37 on ZEUS) at 17:17
Job CASE200R.201745.CPL for RUREADI
(#57123) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE if a batch message from the Prime computer overwrites an Interim System screen.

This message indicates that a report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have a report written to a file, check your office procedures for accessing and printing report files.

6.3 Fields Common to Several Report Forms:

Discuss the Screen Display option available for some 80-column reports, including the use of q to exit from the middle of a screen display.

On some forms that generate 80-column reports, you have a third option in the first Destination field other than **P** or **F**. Enter an **S** in this field to receive a screen display of a report. Your terminal screen clears to display the report's output. After each screen-full of information, press NEXT FIELD to display the next screen page. To exit a screen display before its completion, enter **q** and press NEXT FIELD. When a screen display completes, press NEXT FIELD to return to the first Destination field on the form.

Discuss the Width field for reports having both 80- and 132-column output formats.

Some report processing forms allow you to specify whether you want an 80- or 132-column report generated. Use the Width field common to these forms to enter an **N** to specify an 80-column report or a **W** to specify a 132-column report.

Mention that selection criteria Date fields all require the standard System date format.

Several report processing forms contain Date fields. Always use the standard System date format (**DD-MON-YYYY**) to enter dates.

6.4 Interim System Report Chart:

1 hour

*Review the Interim System Report Chart on the next several pages of this Training Guide, as well as the report processing forms themselves. **NOTE**: Review only reports appropriate for course participants.*

Use the available training aids, as needed (particularly the Interim System Report Chart, the Report Processing portion of the System Map, and Chapter 2 of the User's Handbook).

*Demonstrate entering selection criteria, choosing destinations, and selecting queue types for several reports **(include the Case Abstract Report)**. If appropriate, demonstrate the Screen Display option for an 80-column report.*

Emphasize the many similarities among report forms for entering data necessary to generate information off-line.

The following pages of this Training Guide contain a chart that lists detailed information concerning each report in the Report Processing portion of the Interim System.

For each report, this chart lists:

- Report Program Name (e.g., CASE203F).
- Report Title (e.g., Case Totals by Case Type/Status Report).
- Types of output allowed (i.e., hardcopy printout, computer file, and screen display).
- Output Width (80- and/or 132-columns)
- A description of the report's output (contents, format, sorting order(s) and totals/subtotals provided), as well as a list of required selection criteria.

For a more detailed discussion of individual reports, please see Chapter 2 (Report Processing) in the *Interim System User's Handbook*.

30 minutes
(Course Review and Summary, Questions, Close-Out and Evaluations)

Briefly summarize the material covered in the Data Retrieval (BLM) Course.
Prompt for and answer questions.

Close-out with the class, and have each participant fill out an Instructor Evaluation Form.

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Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE200F 2.7.5 Serial Number List by Case Type Report	132	The Serial Number List by Case Type Report produces a 132-column report or screen display of case serial numbers for a specified case type. The report contains the following data: case type, district, case status, case serial number, case status total, district total, case type total. The report sorts by case type, district, case status, and case serial number. **Required Selection Criteria**: Case Type, Destination and Queue Type.
CASE201F 2.7.6 Serial Numbers by Case Type/Doc Report	132	The Case Totals by Case Type/Doc Report produces a 132-column summary report of the number of cases and acres for each document type with the case type(s) and geographic area specified. The report contains the following data: case type (with description), case status, serial number, filing data, action code, date and description, customer name and address, document type and number, number of cases, number of acres. The report sorts by ascending case type, case status and document type. **Required Selection Criteria:** Mask or Case Type, Window or MTR, Action Code(s), Destination and Queue Type.
CASE202F 2.7.7 Serial Numbers by Date Created Report	132	The Serial Number List by Date Created Report produces a 132-column report of cases created by a specified employee during the specified date range. The report contains the following data: action code, beginning and ending dates, employee ID, serial number, first action date, case type and description, and date case added. **Required Selection Criteria**: Employee ID, Date Range (beginning and ending dates), Destination and Queue Type.
CASE203F 2.2 Case Totals by Case Type/ Status Report	132	The Case Totals by Case Type/Status Report produces a 132-column report listing the total number of cases for each district specified, by case type and case status. The report contains the following data: total cases by case type, case status, district and case type. The report sorts by ascending district (if applicable), case type and case status. **Required Selection Criteria**: District Office(s), Destination and Queue Type.
CASE206F 2.5.5 Township Serial Number Extract Report	132	The Township Serial Number Extract Report produces a 132-column detail report of case township data broken out by case serial number, displaying the case type and total case land records and case land acres. The report contains the following data elements for the township entered in the selection criteria: case serial number, case type and description, number of case land descriptions per case, and total number of case land acres per case. The report sorts by ascending case serial number. **Required Selection Criteria**: Meridian, Township, Range, Destination and Queue Type.

*Key to Symbols: - Printer - File - Screen - Express - Normal/Nite 80 - 80 Char 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE208F 2.7.8 Serial Numbers by LD/ Customer Report	Printer File Express Normal/Nite 132	The Serial Numbers by LD/Customer Report produces a 132-column report of case header information with land descriptions and customers for each case meeting the selection criteria. The report contains the following data: case serial number, case type, case status, claim name, geo name, district, meridian, township, range, section, aliquot part, parcel code, customer ID, name number and customer name. **Required Selection Criteria**: District Office or Window or MTR, Sort Option (serial number or case type), Abstract (Y/N), Destination and Queue Type.
CASE209F 2.3.2 Action Codes Used by Case Type Report	Printer File Screen Express Normal/Nite 80 132	The Action Codes Used by Case Type Report produces a 132-column or 80-column report or screen display of all action codes used within a single specified case type or all case types. The report contains the following data: case type, action code, action description and action count (number of time an action code is used within the case type). The report sorts by ascending action code or action description depending upon your specifications in the selection criteria. **Required Selection Criteria**: Sort Criteria (action code or action description), Destination and Queue Type.
CASE210F 2.3.3 Action Codes Used by Date/Case Type Report	Printer File Screen Express Normal/Nite 80 132	The Serial Number Index Report produces a 132-column report or screen display of case serial numbers in the System that meet the selection criteria you enter. The report sorts by ascending case serial number. **Required Selection Criteria**: Mask or Case Type, Abstract (Y/N), Destination and Queue Type.
CASE211F 2.7.3 Serial Number Index Report	Printer File Express Normal/Nite 132	The Action Codes Used by Date/Case Type Report produces a 132-column or 80-column report of all action codes used during a particular date range, within a specified case type or mask and maintaining a specified case status. The report contains the following data: action code, action description and action count (number of times an action code is used within the case type or mask). The report sorts by ascending action code. **Required Selection Criteria**: Case Type or Mask, Date Range (beginning and ending dates), Destination, Width and Queue Type.
CASE217F 2.5.1 Area Analysis Report	Printer File Express Normal/Nite 132	The Area Analysis Report produces a 132-column summary report of land information, by case type of the cases within the selection criteria, and for each case the number of acres selected, conveyed, rejected/relinquished or withdrawn. The report sorts by ascending case type and serial number or by ascending document type. **Required Selection Criteria**: Window or MTR, Mask or Case Type, Destination and Queue Type.

*Key to Symbols: Printer - Printer, File - File, Screen - Screen, Express - Express, Normal/Nite - Normal/Nite, 80 - 80 Char, 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE219F 2.5.2 Case Summary by Township Report	Printer File Screen Express Normal/Nite 80	The Case Summary by Township Report produces an 80-column report or screen display of the total number of townships selected, and the total number of cases, case land records and case land acres within the specified area. You may limit the report by case type or mask as well. The report contains the following data: total townships, total cases, total lands and total acres within the specified criteria. The report sorts by ascending case type. **Required Selection Criteria**: Window or MTR, Destination, and Queue Type.
CASE220F 2.5.6 Township Exclusion Report	Printer File Normal/Nite 132	The Township exclusion Report produces a 132-column report of township information excluding land records which contain the document type and/or mask code specified in your selection criteria. The report contains the following data: number of acres selected, conveyed, rejected/relinquished or withdrawn. The report sorts by ascending township. **Required Selection Criteria**: Window, Destination and Queue Type.
CASE222F 2.5.3 Land Description Totals by Township Report	Printer File Express Normal/Nite 132	The Land Description Totals by Township Report produces a 132-column summary report of the number of land descriptions in all case types or a specified case type within the identified MTR. This report also provides the total acres within each case type and a grand total for all case types. The report contains the following data: meridian, township, range, case type and description, number of land descriptions and acres, total number of townships, total number of case lands, and total number of acres within the specified criteria. The report sorts by ascending case type. **Required Selection Criteria**: Window or MTR, Destination and Queue Type.
CASE223F 2.1 Case Abstract Report	Printer File Express Normal/Nite 80	The Case Abstract Report produces an 80-column report of a particular case, a series of cases, or group of cases containing specified parameters. The report contains all case information. The report sorts by ascending serial number. Within each serial number, land descriptions are sorted by MTRS, county, borough, survey type, survey number; actions are sorted by date and time; and general remarks are sorted by line number. **Required Selection Criteria**: Destination and Queue Type.
CASE225F 2.3.5 Parcel Totals by Action Code Report	Printer File Express Normal/Nite 132	The Parcel Totals by Action Code Report produces a 132-column report listing the number of parcels (i.e., land descriptions) and cases associated with up to ten qualifying and disqualifying action codes that occur within specified date ranges, for a specified case type or mask and a specified MTR or window. The report contains the following data: action code, action description, number of parcels and number of cases. The report sorts by ascending action code. **Required Selection Criteria**: Mask or Case Type, Window or MTR, Destination and Queue Type.

*Key to Symbols: Printer - Printer; File - File; Screen - Screen; Express - Express; Normal/Nite - Normal/Nite; 80 - 80 Char; 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE226F 2.7.1 Parcel by Serial Number Report	132	The Parcel by Serial Number Report produces a 132-column report of parcel occupancy cases. The report contains the following data: case serial number, case status, parcel code, action date, action code/description, meridian, township, range, section, county/borough, aliquot part, free format, acres, and survey type, number, direction, fraction and suffix. **Required Selection Criteria**: Window or MTR, Mask or Case Type, Case Status, Action Code and Date Range (beginning and ending dates), Destination and Queue Type.
CASE227F 2.7.2 Serial Number History Analysis Report	132	The Serial Number History Analysis Report produces a 132-column report of case serial numbers, their status, acres, case type and customer information meeting selected criteria. The report contains the following data: case serial number, case type/description, case status, total case land acres, and customer name. This report sorts by case serial number. **Required Selection Criteria**: Mask or Case Type, Case Status, Destination and Queue Type.
CASE228F 2.7.4 Serial Number List by District/RA/Case Type Report	132	The Serial Number List by District/RA/Case Type Report produces a 132-column report of the last case action and case status of cases meeting your selection criteria. The report contains the following data: case serial number, case status, last action code, date and description. **Required Selection Criteria**: Mask or Case Type, Destination and Queue Type.
CASE231F 2.6.1 Mining Claim Activity by Township Report	132	The Mining Claim Activity by Township Report produces a 132-column report of mining claim activity (customer and recent action information) on cases within a specified geographic area and case status. The report contains the following data: meridian, township, range, case type, customer ID, name number and name, address number and address, case serial number(s), claim name, posting date, last action code/description/date, and section. In addition, for each customer, the report prints the total number of cases for the customer, for the case type and the township. **Required Selection Criteria**: Window or MTR, Case Status, Destination and Queue Type.
CASE232F 2.5.4 Land Status Report	132	The Land Status Report produces a 132-column detail report of land information and action to land links. The report contains the following data: case serial number, case status, case type/description, action code (as identified in the selection criteria), action date/description, document type/number, meridian/township/range, county/borough, survey type and number, direction, fraction, suffix, aliquot part, and the actions entered in the selection criteria. The report sorts by ascending case type. **Required Selection Criteria**: Window or MTR, Mask or Case Type, Action Code and Date Range (beginning and ending dates), Destination and Queue Type.

*Key to Symbols: - Printer - File - Screen - Express - Normal/Nite 80 - 80 Char 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE233F 2.6.4 Serial Numbers by Township/Case Type Report	132	The Serial Numbers by Township/Case Type Report produces a 132-column report of case serial numbers with customer information for the specified Mining Claim Mask or case type(s) within a window or MTR. The report contains the following data: meridian, township, range, section, case serial number, case status, case type/description, and customer information. This report sorts by case type and case serial number within the specified window or MTRS. **Required Selection Criteria**: Mask or Case Type, Window or MTR, Destination and Queue Type.
CASE234F 2.6.3 Mining Claim Weekly FLPMA Report	132	The Mining Claim FLPMA Report produces a 132-column detail report of mining claim activity within a specified date range on a weekly basis for FLPMA. The report contains the following data for the date range entered in the selection criteria: date, active claims information with and without land descriptions (by land office), total active claims (by land office), total closed claims (by land office), total claims (by land office), and a state total. The report sorts chronologically. **Required Selection Criteria**: Destination and Queue Type.
CASE235F 2.6.2 Mining Claim by Case Type/Customer Report	132	The Mining Claim by Case Type/Customer Report produces a 132-column report of mining claim case, customer and action information. The report contains the following data: case status, case type, customer ID, name number and name, address number and address, case serial number, meridian, township, range, section, survey type, number, direction, fraction and suffix, posting date, last action/code/description, claim name, and total cases for this customer. **Required Selection Criteria**: Mask or Case Type, Destination and Queue Type.
CASE236F 2.3.4 Action Codes Used Monthly by Case Type Report	132	The Action Codes Used Monthly by Case Type Report produces a 132-column report of all action codes used on a monthly basis within a specified date range and case type. Only months in which actions were entered into the case type's cases appear on the report. Consequently, some gaps in the chronology of the report may exist, e.g., May 1990 and February 1991. You may also limit this report by district, action code, and status. The report contains the following data for each month within the specified date range: month and year, total number of times selected action code(s) were used per month, total number of times each action code was used during the entire date range, and the total number of cases. The report sorts by chronological date of the range entered by month. **Required Selection Criteria**: Date Range (beginning and ending date), Case Type, Destination and Queue Type.
CASE237F 2.6.5 Total Mining Claim Customer List Report	132	The Total Mining Claim Customer List Report produces a 132-column report of the number of customers and number of cases in each case status for all mining claim cases, and the number of cases with multiple customers. The report contains the following data: case status, total number of cases, total number of mining claim customers and a count of cases with multiple customers. **Required Selection Criteria**: Destination and Queue Type.

*Key to Symbols: - Printer - File - Screen - Express - Normal/Nite 80 - 80 Char 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE255F 2.3.1 Action Code Totals Used by Unit Report	Printer, File, Screen; Express, Normal/Nite; 80	The Action Code Total Used by Unit Report produces an 80-column report or screen display listing up to four action codes used within each organizational unit in the administrative state during a specified date range. The report contains the following data: action code, organizational unit and number of uses of each action code within each unit. The report sorts by organizational unit. **Required Selection Criteria**: Case Type, Action Code and Date Range (beginning and ending dates), Destination and Queue Type.
CASE303F 2.5.7 Township Status Display	Printer, File; Express, Normal/Nite; 80	The Township Status Display Report produces an 80-column report of the number of cases within each section of a township. The report contains the following data: number of cases per section within a township, total number of cases within the township, total number of cases containing lands within the township, but not coded to any section. The report output is identical to the screen display. **Required Selection Criteria**: Meridian, Township, Range, Case Type or Mask, Destination and Queue Type.
CASE304F 2.6.8 Mining Claim summary - FY Quarters Report	Printer, File; Express, Normal/Nite; 80	The Mining Claim Summary - FY Quarters Report produces an 80-column summary report of the number of mining claims on file at the beginning of the specified quarter, the number of claims received during the quarter, and the annual filings and number of annual cases on file. The report contains the following data for the fiscal year quarter entered in the selection criteria: fiscal year and quarter, on file and received claims for the quarter and the fiscal year. **Required Selection Criteria**: Fiscal Year, Fiscal Year Quarter and Destination.
CASE305F 2.8 Mask Titles Report	Printer, File; Normal/Nite; 132	The Mask Titles Report produces a 132-column report of the masks used in the System and their titles. The report contains the following data: mask number, mask title, mask owner, number of case type codes in the mask, and the number of cases. **Required Selection Criteria**: Sort Select (mask number or mask title), Destination and Queue Type.
CASE306F 2.9 Case Type Mask Descriptions Report	Printer, File; Express, Normal/Nite; 132	The Case Type Mask Descriptions Report produces a 132-column report of the masks used in the System, their titles and their case types. The report contains the following data: mask number, mask description, mask owner, and case type descriptions. **Required Selection Criteria**: Destination and Queue Type.
CASE307F 2.10 Mailing Labels Report	Printer, File; Express, Normal/Nite; 132	The Mailing Labels Report produces a list of names and addresses for mailing labels retrieved from the entered selection criteria. The report contains the following data: name and address. **Required Selection Criteria**: Sort Sequence (name or ZIP code), Output Options (print, labels or both), Destination and Queue Type.

*Key to Symbols: - Printer - File - Screen - Express - Normal/Nite 80 - 80 Char 132 - 132 Char

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria
CASE308F 2.6.6 Mining Claim Missing Data Report	132	The Mining Claim Missing Data Report produces a 132-column report of data missing from mining claim cases, specifically land descriptions, customers and claim name. The report contains the following data: case serial number, meridian, township, range, section, case type and description, owner and claim name. **Required Selection Criteria**: Destination and Queue Type.
CASE311F 2.6.7 Mining Claim Decision Report	132	The Mining Claim Decision Report produces a 132-column report or screen display of mining claim decision action(s), specified in the selection criteria, added to cases within the specified date range. For each decision action added to cases during the specified date range, this report identifies each specific case, as well as the total number of cases. The report contains the following data: date (month and year), action code, serial number(s) and total number of cases for each action code. **Required Selection Criteria**: Destination and Queue Type.
CUST200F 2.4.1 Customer ID List Report	132	The Customer ID List Report produces a 132-column report of a particular customer, customers entered within a specified data range, or all customers within the System. The report contains the following data: customer ID, customer date (date the customer was added to the System), customer type, name date (date the name was added or changed), customer name, address number, address date (date the name was added or changed), and customer address. The report sorts by customer ID, and name number and address number within each customer ID. **Required Selection Criteria**: Destination and Queue Type.
CUST202F 2.4.2 New Customer Report	80	The New Customer Report produces an 80-column report of customers created within a specified data range. The report contains the following data: customer ID, customer name(s), customer address(es), number of cases to which the customer is linked, and employee login of the person who created the customer. The report sorts by customer ID. **Required Selection Criteria**: Date Range (beginning and ending dates), Destination and Queue Type.

Program Name and Title	Output, Queue, Width*	Report Description and Required Selection Criteria

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*Key to Symbols: - Printer - File - Screen - Express - Normal/Nite 80 - 80 Char 132 - 132 Char

C

C. Case Processing Training Guide

nstructor's Version
Includes Teaching Notes

The purpose of this course is...

- To teach students to perform case processing functions using the Interim System forms. These functions include:

  - updating existing case information

  - locking and unlocking case records

1. The Interim System Case Processing Course

1.1 Participants

10 minutes

(Instructor Introductions, Purpose on page 1, Participants, prerequisites and Questions)

The Interim System Case Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update and deletion of automated land and mineral case data, including case land, action, geographic name, and remarks data. All BLM employees responsible for either case processing tasks or the support/supervision of such tasks should participate in this course.

Individuals participating in this course should fit clearly into at least one of the following personnel categories:

Emphasize who should and should not be in this class.

Case Processing Personnel
Individuals in this category perform the following functions in the Interim System database:

- Add, change and delete serialized case information interactively.
- Lock and unlock action or land records interactively.

Ad-Hoc Data Query Personnel
This category of users develops ad-hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Restricted Case Processing Functions Personnel
This category consists of individuals who assign case serial numbers, establish blocks of cases and generate associated accounting advices, add actions or general remarks to ranges of serial numbers, add general remarks to random serial numbers, void cases, update claim names in random cases and generate mining claim tapes.

System Application Support & Maintenance Personnel
Individuals in this category maintain the operational status of the Prime computers and the Interim System

software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

• Exposure to and understanding of the information presented in the *Interim System Data Retrieval (BLM)* course.

Emphasize that this course will make little sense to those who have not taken the prerequisite course.

Although the Interim System Case Processing course will contain a brief review and question and answer session concerning the concepts, terms and access procedures (Prime and Interim System) taught in the prerequisite courses, students should already be familiar with this material. Students should also be familiar with the purposes and use of the Interim System forms in Report Processing and Data Retrieval Functions. The Interim System Case Processing trainers will assume that participants need only a quick warm-up before launching into new information. Students should review all the training materials they received in prerequisite courses before coming to class.

All Interim System Case Processing course participants should be familiar with the following topics:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What kinds of data manipulations the Interim System can perform.
- Interim System database and Structured Query Language concepts and terminology.
- How to access and navigate on the Prime.
- How to access the Interim System and use Interim System/Oracle® login procedures.
- Interim System security.
- Interim System structure, system map, and basic navigation in the menu-driven Interim System.
- Functional use of Interim System Report Processing and Data Retrieval Functions.

• Proper use of the forms in Report Processing and Data Retrieval Functions for the performance of all on-line and off-line data retrieval tasks in the Interim System database.

Prompt for and answer questions.

15 minutes

(Ice Breaker, Housekeeping, Rules and Attendance.)

For an Ice Breaker, have students fill out name tags/place cards and introduce themselves.

Review the housekeeping rules for the classroom.

Pass the Attendance Sign-In sheet around the class.

2 . Purpose of Case Processing Course

10 minutes

(restate Purpose of this Course, What is Case Processing?, AALRS Tasks Covered in this Course, Course Objectives and Course Schedule.)

To teach students to perform case processing functions using the Interim System forms. These functions include updating existing case information and locking and unlocking case action and land records.

2.1 What is Case Processing?

Explain what case processing is in general and briefly review the tasks that can be performed using the forms in the Case Processing section of the System.

Refer to the System Map when reviewing Case Processing tasks and forms.

This course uses the term case processing to address the set of automated tasks that affect land and mineral case information stored in the Interim System database. Specifically, case processing includes the following tasks:

- **Adding** new land and mineral case information into the Interim System database as when new actions occur in a case.
- **Updating** case information associated with serialized cases in the Interim System database.
- **Deleting** certain types of land and mineral case recordation information from serialized cases in the Interim System database.
- **Locking or Unlocking** action or land description records in the Interim System database associated with a serialized land or mineral case.

2.2 AALRS Tasks Covered in This Interim System Course

Briefly review the AALRS tasks addressed in this course.

Emphasize that the Interim System allows users to perform all of the case update tasks formerly performed in AALRS.

- Change the user password, on-line, for public access to the Interim System for terminals located in BLM public rooms.
- Record an Alaska Native Allotment parcel occupancy date within a serialized case in the automated system.
- Assign an existing customer name applicant to an established case file.
- Change the action codes in an established case file.
- Update a mining claim name within a serialized case file.
- Lock/Unlock action codes and land descriptions within a serialized case file.
- Set case status within a serialized case.
- Remove a customer name from a serialized case.
- Record a land conveyance within a serialized case.
- Add, change or delete the general remarks in a serialized case.
- Change the case type of a serialized case file.
- Create data reflecting Federal Records Center (FRC) Information to a serialized case.
- Enter case commodity codes (including those for "by-products") to a serialized case file.
- Record U.S. Rights in Title for a serialized case file.
- Record lease terms (a period of time, e.g., years, months, days, etc...) to a serialized case file.
- Calculate the land acreage conveyed under the Alaska Native Claims Settlement Act (ANCSA) by entitlement type (e.g., surface to village, subsurface to region, etc...).
- Add, change or delete the interest relationship code and percent interest value in a serialized case.

- Retrieve a customer name from the database by alphabetic search or customer name ID number.
- Retrieve help reference for a specified data field.
- Make data corrections from error listings of transactions by user identification.
- Add, change or delete the parcel occupancy date code of a serialized case.
- Add, change or delete an established customer name in a serialized case file.
- Add, change or delete the type of land conveyance action of a serialized case.
- Add, change or delete the Federal Records Center (FRC) data of a serialized case.
- Add, change or delete the case commodity data (including by-products) of a serialized case.
- Add, change or delete the U.S. Rights in Title data of a serialized case.
- Add, change or delete the lease term data of a serialized case.
- Add, change or delete information in an existing case land record.
- Retrieve listings of all entries and descriptions possible within a coded data element.

3. Case Processing Course Objectives

Write objectives on a flip chart as each is reviewed.

Review class schedule.

Prompt for and answer questions.

The performance objectives outlined below should be met upon completion of the Interim System Case Processing course.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the menu-driven Interim System, moving among the Interim System Main Menu, the Case Processing Menu, and all the submenus and forms used for automated case processing tasks.
- briefly describe (in their own words) the process of accessing and using the appropriate forms to add, change and delete information associated with a serialized case (i.e., using all appropriate and necessary update forms to update an automated case file).
- access and use the update forms in Case Processing to update (add, change or delete) any type of serialized case information in the Interim System database.
- access and use the lock and unlock forms in Lock/Unlock Action/Land Records to lock and unlock serialized case action and land records in the Interim System database.

4. Changing Interim System Oracle® Passwords for BLM Public Room Access

Explain that only an individual with significant System privileges, usually the DBA, can change user passwords.

If a public user Interim System Oracle® password needs to be changed, only the Database Administrator (DBA) in your state can do this. Please contact your DBA to request this change.

NOTE:
To change Interim System Oracle® passwords for all public (and most BLM) users, you must have Oracle DBA privileges and access to Structured Query Language (SQL).

5. Menu-by-menu, Form-by-form

10 minutes

Introduce the menu-by-menu, form-by-form module, its purpose and its organization into sections and subsections.

Prompt for and answer questions concerning each type of section in this module (Purpose, Navigation, Workflow, etc...) before moving on to discuss the next type of section.

Use the appropriate training aids as needed for each menu and form section: Instructor/ Student computers, keyboard templates, LCD panel and overhead projector, training database, training wall displays, System Map, flipcharts, whiteboards, markers, this Training Guide, System Documentation and the BLM Data Element Dictionary.

Purpose of this module of the course:

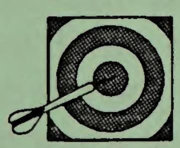
The purpose of this training module of the Interim System Case Processing course is to present the purpose and intended use of each form and submenu in Case Processing. Also included is an overview of the purpose and intended use of forms in Customer Processing commonly used by BLM Case Processing personnel. This module also provides an overview of the types of land and mineral recordation data addressed on each Case Processing form.

Please see the Interim System documentation for a more thorough discussion of each field and the land and mineral information for which each is designed.

Organization of this course module:

This module of the Case Processing Training Guide is divided into numerous sections, one for each submenu and form in Case Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose, Navigation, Required Data, Structure, Workflow**, and **Quirks**.

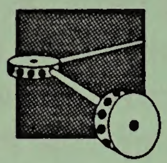
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs which describe the contents of each subsection.



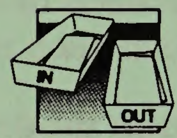
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete, or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data, the Structure subsection lists them. This subsection may also discuss whether a form (or page in a form) is divided into several blocks of fields, and whether these separate blocks address different categories of data. This subsection may also mention whether a certain page of a multi-page form is optional.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

NOTE:
In the sections of a few forms in this module, there are two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Case Processing Menu

5 minutes

Discuss navigation to the Case Processing Menu from the Main Menu.

Review the general purpose of each menu option.

Refer to the Case Processing portion of the System Map.

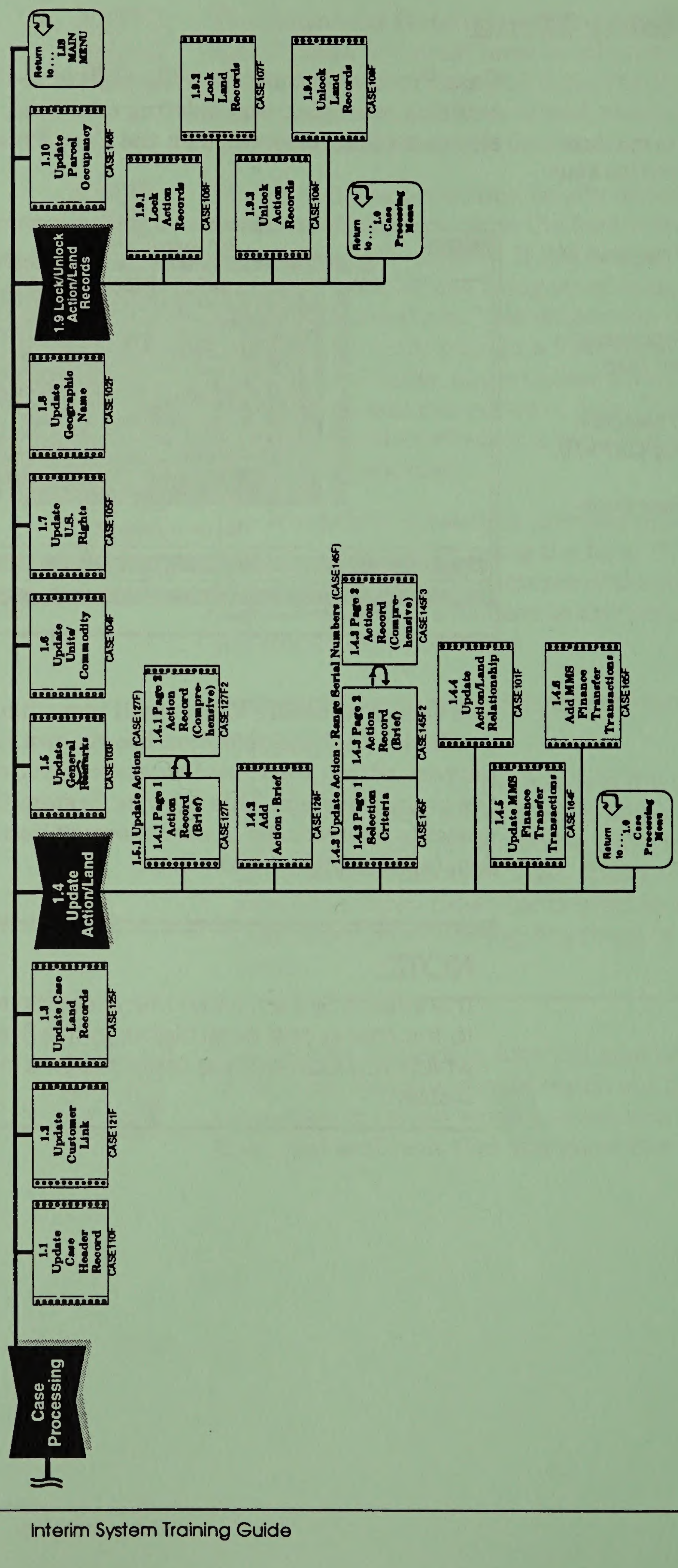
Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions.

Case Processing comprises the bulk of the System in entering, changing and deleting case data. There are eleven sections or options on the Case Processing Menu:

The Case Processing Menu itself identifies the options available. Each menu option has its own function and purpose within the Case Processing environment and the overall System. This Interim System training class presents an overview of each menu option and the form(s) accessible within them.

NOTE:
The Interim System Main Menu option returns you to the menu one level higher in the System, from which you can access other options in the Interim System.


Case Processing
1.1 Update Case Header Record CASE110F
1.2 Update Customer Link CASE121F
1.3 Update Case Land Records CASE125F
1.4 Update Action/Land
1.5 Update General Remarks CASE103F
1.6 Update Units/ Commodity CASE104F
1.7 Update U.S. Rights CASE105F
1.8 Update Geographic Name CASE102F
1.9 Lock/Unlock Action/Land Records
1.10 Update Parcel Occupancy CASE148F
Return to . . . LIS MAIN MENU
1.5.1 Update Action (CASE127F)
1.4.1 Page 1 Action Record (Brief) CASE127F
1.4.1 Page 2 Action Record (Comprehensive) CASE127F2
1.4.2 Add Action - Brief CASE128F
1.4.3 Update Action - Range Serial Numbers (CASE145F)
1.4.3 Page 1 Selection Criteria CASE145F
1.4.3 Page 2 Action Record (Brief) CASE145F2
1.4.3 Page 3 Action Record (Comprehensive) CASE145F3
1.4.4 Update Action/Land Relationship CASE101F
1.4.5 Update MMS Finance Transfer Transactions CASE164F
1.4.6 Add MMS Finance Transfer Transactions CASE165F
Return to . . . 1.0 Case Processing Menu
1.9.1 Lock Action Records CASE108F
1.9.2 Lock Land Records CASE107F
1.9.3 Unlock Action Records CASE106F
1.9.4 Unlock Land Records CASE109F
Return to . . . 1.0 Case Processing Menu

Update Case Header Records Form (CASE110F)

15 minutes

Review the purpose of the Update Case Header Records form. Be sure to specify exactly which data elements are part of the case header.

Purpose and use of the Update Case Header Records Form:

This form allows you to make changes to information related to a case as a whole, generally referred to as case header data, within previously established cases. The following types of case data can be added and updated using this form: case type, claim name, disturbed acres, case acres, all FRC information and lease terms. Some of these fields may be restricted depending upon case type or your privileges within the Interim System. You may not access the remaining fields on the form because they only display data for your information.

Use the Update Case Header Records Form (CASE110F) to change, add and delete case header information, and to record necessary information when a case is sent to the Federal Records Center (FRC).

Review who uses this form and why.

BLM personnel responsible for updating case header information for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

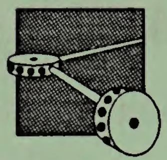
Navigation to this form and use of CASE110F program name in QXFER:

The Update Case Header Records Form (CASE110F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Case Header Record option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE110F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

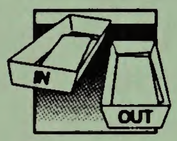
- Case Serial Number.
- Information for an update (addition, change or deletion) you wish to make in any of the accessible fields on this form.



Review this form's structure and the types of data that can be entered, retrieved and updated.

Structure of the form:

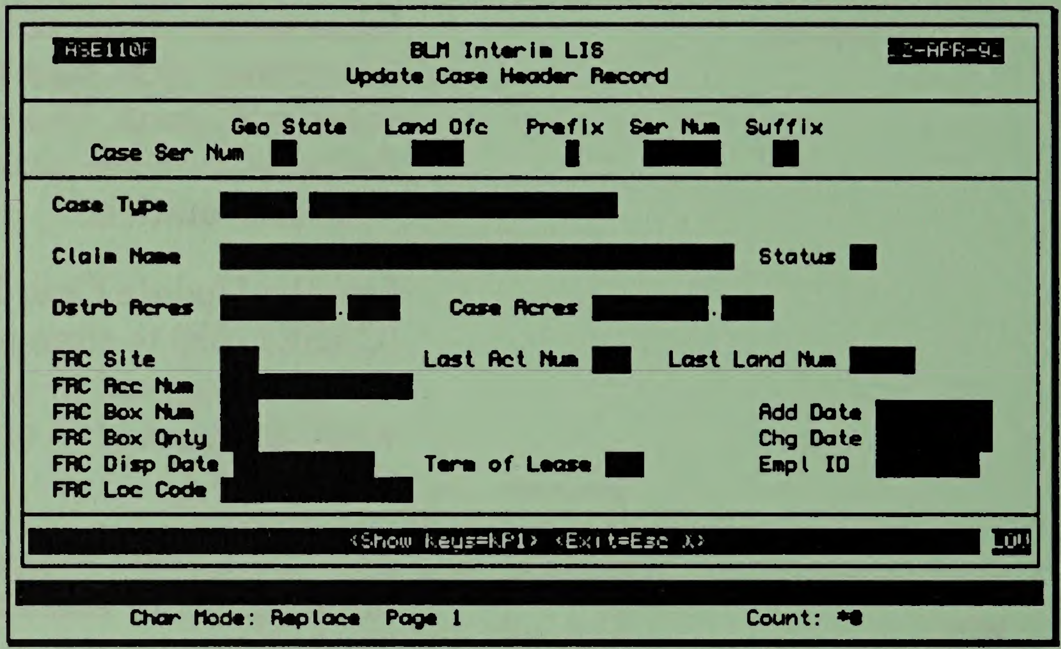
The Update Case Header Records Form (CASE110F) consists of a single page containing fields specifically related to case header information in the Interim System database.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Update Case Header Record form.

Use the available training aids as needed.



STEP 1

Enter a valid case serial number at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, in necessary.

Demonstrate and discuss LOV where available.

All existing case header information for the case appears in the form's fields. On all cases in the System, you receive, at minimum, data in the Case Type, Case Status, Last Action Number, Last Land Number, Add Date, Change Date and Employee Identification fields.

Review each of the data elements displayed in the form, emphasizing which fields are updatable, which are restricted to certain case types and which are for display only.

You may not access the following fields on this form. These protected fields appear for your information only, and the cursor skips them as you move around the form:

Case Status
Last Action Number
Last Land Number
Add Date, Change Date
Employee Identification

STEP 2

Add, change or delete data from any of the following fields on the form within the noted restrictions:

Case Type
(only users with sufficient privileges may alter the case type)

Claim Name
(accessible only for mining claim cases)

Disturbed Acres
(accessible only for surface management cases by pressing PREVIOUS FIELD in the Case Acres field)

Case Acres

Federal Records Center (FRC) Site Code

FRC Accession Number, FRC Box Number

FRC Box Quantity, FRC Disposal Date

FRC Location Code

Term of Lease

Commit your changes to the database when you complete your edits of case header information.

Emphasize that to change case type values a user must be assigned a Security Level of 10 or higher. Users with lower Security Levels cannot change case type.

NOTE:

An error message appears on the message line if you attempt to change the case type with insufficient Interim System privileges.

Although an FRC disposal date earlier than today's date is acceptable, a warning message appears for your information when such a date is entered.

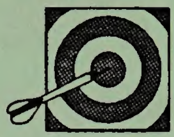
Review the Quirks subsection point by point and briefly summarize the use of the Update Case Header form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Quirks and special data issues for CASE110F:

- You may access and update only the noted fields on this form; all others are displayed only for your information.
- Only users with sufficient System privileges may change case type using this form.
- Although an FRC disposal date earlier than today's date may be entered, a message warns you of this unusual situation.

Update Customer Link Form (CASE121F)



15 minutes

Review the purpose of the Update Customer Link form. emphasize the difference between customer link data and customer data.

Review who uses this form and why.

Purpose and use of the Update Customer Link Form:

This form allows you to add, delete or change a customer/case link, the interest relationship and percent interest on a previously established case. Both the case serial number and customer data must already exist in the System before you can use this form.

Use the Update Customer Link Form (CASE121F) to add a new customer to the case, to delete a customer from the case, or if the interest relationship or percent interest of a customer changes, such as after application approval.

BLM personnel responsible for updating customer information for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

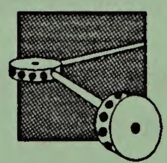
Navigation to this form and use of CASE121F program name in QXFER:

The Update Customer Link Form (CASE121F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Customer option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE121F program name.

Discuss data required to use this form.

Required Data you must have (or obtain using List of Values screens) to use this form:

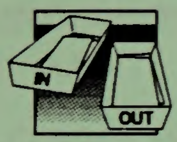
- Case Serial Number.
- Customer ID, Customer Name and Address of an existing customer.
- Interest Relationship of the customer to the case.



Review the form's structure and the type of data that can be entered, retrieved and updated.

Structure of the form:

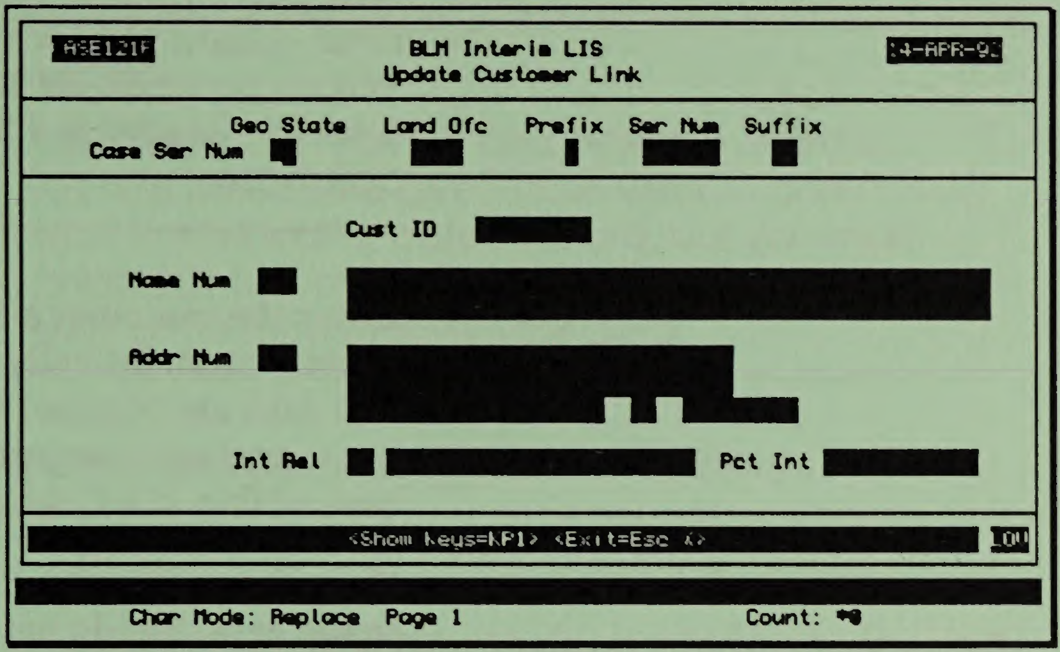
The Update Customer Link Form consists of a single page containing fields specifically related to customer records associated with an established case in the Interim System database.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Update Customer Link form.

Use the available training aids as needed.



STEP 1

Enter a valid case serial number at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, in necessary.

Demonstrate and discuss LOV where available.

Demonstrate how to retrieve and scroll through multiple existing customers in a case and update or delete this data.

All existing customer records linked to the case are retrieved, and data concerning one of these customers is displayed. Although this form displays only one customer record at a time, you can scroll through the other records, if multiple customers have been linked to the case, using NEXT/PREVIOUS RECORD.

STEP 2

To update an existing customer record related to the case, scroll to it, move to the appropriate field(s) in the record, and add, change and delete data as needed. Commit your updates before exiting the form.

STEP 3

To delete an existing customer record related to the case, press DELETE RECORD when the record is displayed on the form. Although the record disappears from the form, it is not truly deleted from the database until you also press COMMIT.

Emphasize that the DELETE RECORD procedure must end with COMMIT.

STEP 4

To link a customer in the System to the case, press CREATE RECORD or, if you are on the last customer record linked to the case, NEXT RECORD. The fields on the form blank out, and the cursor moves to the Customer ID field.

Review the procedure to link a customer to a case.

Remind students that this form does not allow them to add new customers to the System.

NOTE:
Please follow your office procedures for adding new customers to the customer database. Use the FIND - Customer Form (CUST400F) or the List of Values available in the Customer ID field on this form to determine if the customer exists in the database.

Enter the customer's ID in the Customer ID field. The System automatically completes the Name Number and Address Number fields, defaulting to the lowest name and address numbers from the customer database within the Customer ID entered.

Discuss and demonstrate using the Customer Information Screen, including entering and executing a query using the wildcard character.

If you know the name of a customer you want linked to the case, but do not know their ID number, press List of Values (LOV) in the Customer ID field and access the Customer Information screen (DICT138F). Move to the Customer Name field, enter the name as it would be stored in the database, and press EXECUTE QUERY. Use the wildcard character, %, in the name, if necessary. The System retrieves all names in the database that match the name entered, and you may scroll through them one at a time using NEXT/PREVIOUS RECORD. When you locate the customer you want to link to the case, press NEXT FIELD to return the displayed customer ID, name, name number, address and address number to the Update Customer Link Form.

Briefly review the Customer Name and Customer Address Information screens.

You may change the automatically retrieved name and address numbers to retrieve other names and addresses, if present, within the Customer ID. There are LOV screens accessible from the Name Number field (Customer Name Information, DICT139F) and the Address Number field (Customer Address Information, DICT140F). These screens function like the Customer Information screen, allowing you to scroll through multiple names or addresses, if present, within the specified customer ID, and retrieve them for the appropriate fields on the Update Customer Link Form.

Enter the appropriate interest relationship (required) and percent interest (optional) for the customer being linked to the case.

Remind students that only a single COMMIT is required to save multiple customer link updates.

You may continue to link more customer records to the case, but remember to press COMMIT before exiting the form.

NOTE:
You may add, change and delete customer records linked to a given case without committing each individual updated record, but you must press COMMIT at the end of the session before exiting the form to save your data.

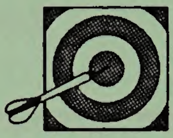
Review the Quirks subsection point by point and briefly summarize the Update Customer Link form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Quirks and special data issues for CASE121F:

- This form is for updating customer information linked to a case. To update the customer information itself (name, address, etc...), use the Maintain Customer File Form (CUST101F) in Customer Processing.
- Follow your office procedures for adding new customers to the customer database. Use the FIND - Customer Form (CUST400F) or the available List of Values screens on this form to determine if the customer exists in the database.

Update Case Land Records Form (CASE125F)



45 minutes
(including Exercise C-1)

Review the purpose of the Update Case Land Records form.

Review who uses this form and why.

Purpose and use of the Update Case Land Record Form:

This form allows you to add, change and delete case land description information and related survey data for an existing case.

BLM personnel responsible for updating case land information for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

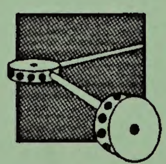
Navigation to this form and use of CASE125F program name in QXFER:

The Update Case Land Form (CASE125F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Case Land option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE125F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

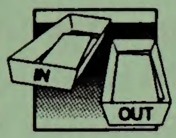
- Case Serial Number.
- Meridian, Township, and Range or Geographic State and County/Borough.
- District Office.
- Information for a data update (addition, change or deletion) you wish to make in any of the other fields on this form.
- Employee Initials (Alaska only).



Review this form's structure and the types of data that can be entered, retrieved and updated.

Structure of the form:

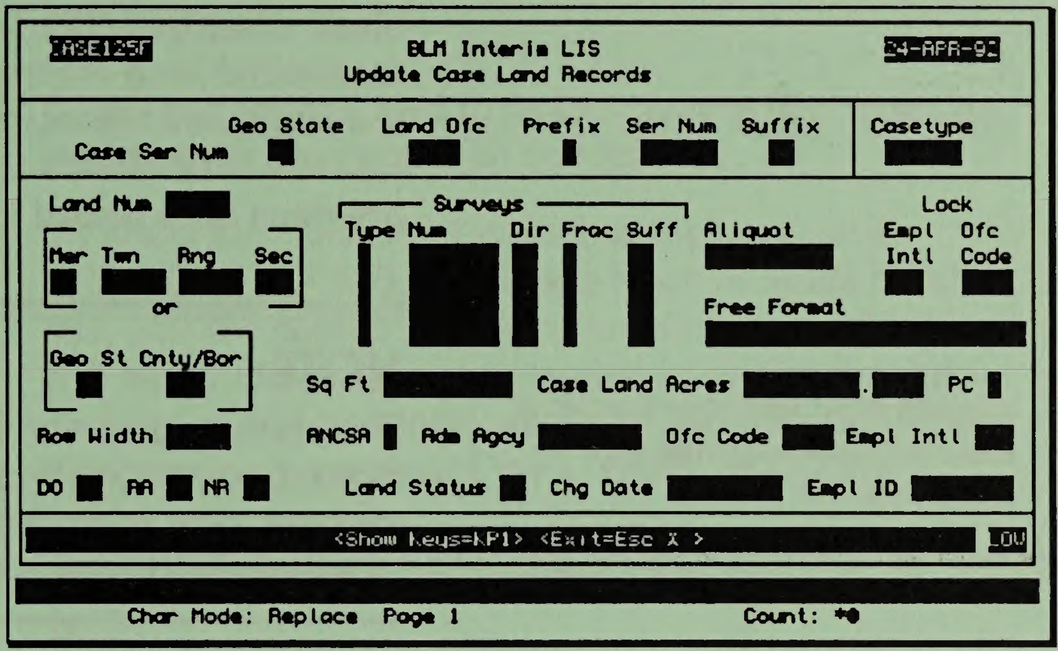
The Update Case Land Record Form consists of a single page containing fields specifically related to a case land description associated with an established case in the Interim System database.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Update Case land Records form.

Use the available training aids as needed.



CASE125F
BLM Interim LIS
Update Case Land Records
24-APR-92

Geo State | Land Ofc | Prefix | Ser Num | Suffix | Casetype
Case Ser Num

Land Num
Surveys
Type Num Dir Frac Suff
Aliquot
Lock
Empl Intl | Ofc Code
Mer Twn Rng Sec
or
Free Format
Geo St Cnty/Bor
Sq Ft | Case Land Acres | PC
Row Width | ANCSA | Adm Agcy | Ofc Code | Empl Intl
DO | RA | NR | Land Status | Chg Date | Empl ID

<Show Keys=KP1> <Exit=Esc X > LOV

Char Mode: Replace Page 1 Count: *0

STEP 1

Enter a valid case serial number at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. The case type of the specified case appears in the display-only field to the right of the case serial number.

Demonstrate and discuss LOV where available.

STEP 2

Although this form displays only one case land record at a time, you can retrieve all of the case land records in a case simultaneously and scroll back and forth through them, viewing and working on one at a time.

NOTE:

If the case's land records are locked, the office code and employee initials of the person who locked them appear in the Lock Employee Initials and Lock Office Code fields on the upper-right of the form just below the Case Type field.

Explain what happens when land records are locked in a case.

While you may update a land record linked to an action record(s) without removing the links, you may not entirely delete such a land record.

Emphasize that land descriptions linked to action(s) can be changed but not deleted.

Demonstrate how to retrieve and scroll through a case's land records.

To retrieve all of the case land records for update, leave the Land Number field blank, press CLEAR FIELD, then press NEXT FIELD or EXECUTE

QUERY. The System displays data for the lowest numbered case land record (usually **00001**) in the fields on the page. To scroll to the next case land record, press NEXT RECORD in any field of the lower block other than the Land Number field. The next sequential land record's data appears in the fields on the page, and the cursor returns to the Meridian field. Use the PREVIOUS RECORD key to scroll to the previous land record in the case.

Explain what land numbers in a case are and why they are important.

NOTE:

The unique land number associated with each case land record in a case is vital for linking case land records to action information and setting case land status in the Interim System.

Mention how to enter and retrieve a single land record for update.

To retrieve a single case land record for update, enter the appropriate land number in the Land Number field and press NEXT FIELD or EXECUTE QUERY. The System displays the record's data in the fields on the page. Since only one record is retrieved, you cannot scroll from the displayed record to other records in the case.

!

WARNING:

Caution students about returning to the Land Number field once and record(s) have been retrieved.

Although you can return to the Land Number field using PREVIOUS FIELD, doing so allows you to retrieve only individual case land records. You cannot return to the Land Number field, clear it and requery all of the land records in the case; if you attempt this, the first land record appears, but you cannot scroll to any of the case's other land records. To requery all of the case's land records, you must press CLEAR FORM, reenter the case serial number and begin again.

STEP 3

Demonstrate how to change or delete a land description.

To update an existing case land record, query the specific record by land number or scroll through all of the case's land records until the appropriate record appears on the page. Use NEXT/PREVIOUS FIELD to move around the page, adding, changing and deleting data as needed. Press COMMIT to save your updates.

STEP 4

Emphasize that the DELETE RECORD procedure must end with a COMMIT.

To delete an existing case land record, press DELETE RECORD when that record is displayed on the form. Although the record disappears from the form, it is not truly deleted from the database until you also press COMMIT.

Case land records tied to action records in a case can be updated, but cannot be deleted.

STEP 5

Review the procedure to add a new case land record to a case.

To add a new case land record to the case, press CREATE RECORD. The lower block of fields blanks out, and the cursor moves to the Meridian field. If you will be entering meridian, township and range data and are on the last land record in the case, you may also create a new record with NEXT RECORD.

Mention how to use DUPLICATE RECORD to save time and effort.

NOTE:

If you are adding a land record that has field values similar to those of an existing land record in the case, display the existing record on the form, and press CREATE RECORD followed by DUPLICATE RECORD. A new, duplicate record is generated, and you can move around the page, adding, changing and deleting data as needed. This procedure can save you from reentering identical land information over and over again.

Demonstrate and discuss how to enter data in each of the form's case land fields.

Briefly review the three special Meridian Codes.

If the case you are working with is in a Public Land Survey System (PLSS) state, enter the meridian code, township and range designations, and section number for the land description. Use the List of Values (LOV), if necessary. If the case is in a non-PLSS state, press NEXT FIELD in the blank Meridian field, and skip to the County/Borough field.

There are three special meridian codes of which you should be familiar. Meridian code **00** is used only in cases that will never have a land description. Meridian code **98** is used only to identify lands having invalid meridian/township/range/section descriptions. Meridian code **99** is used only to identify lands in cases where valid LLD data does not yet exist, but will in the future. Codes **00** and **99** cause the Township, Range and Section fields to fill automatically with zeros, and move the cursor to the Office Code field at

the bottom of the form. For meridian code **98**, you must enter township, range and section data, even though these data are invalid.

Briefly review the structure and format of the Township and range fields. Describe the options available in the Section field.

Although the five-character Township and Range fields each look like one field, they are actually divided into three separate sections. The first section is for the three-digit township or range number. While this section zero-fills if you enter the number and press NEXT FIELD, it may be less confusing to enter leading zeros where needed (e.g., **003**, **037**). The second section of the Township and Range fields is for the single-digit fractional code of the township or range (**0** = no fraction, **1** = 1/4, **2** = 1/2, **3** = 3/4); the fractional code is usually zero. The third section is for the single-character direction of the township or range (**N**, **S**, **E**, or **W**).

Once you have entered meridian, township and range data, entering a section number is optional; if you leave this field blank, it fills automatically with zeros. If you enter `999` (the code for an entire township) in the Section field, `ENTIRE TOWNSHIP` will be printed on case abstracts following the specified meridian, township and range information.

Describe how the MTRS entered is validated by LLD information and how fields on the form may fill with data pulled from LLD.

When you press NEXT FIELD in the Section field, the meridian, township, range and section combination you entered are validated against the System's legal land description (LLD) information. In addition, various fields on the form (e.g., County/Borough, District Office and Administrative Agency) may automatically fill with values pulled from the System's legal land description (LLD) data.

The Geographic State field automatically fills with the proper code.

If you did not enter meridian, township and range data (e.g., in a non-PLSS state), a County/Borough code is required. If you entered MTR data, this optional field may already contain a value; if the county/borough code is missing or incorrect, enter the appropriate code if desired. Use the List of Values (LOV), if necessary.

Demonstrate and review the entry of various types of survey data including nested surveys. Review how the survey type entered controls cursor navigation.

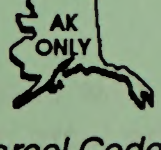
NOTE:
Depending on the case type and MTRS entered for your case, the System may skip or require various fields on this form, including: Survey Type, Survey Number, Direction, Fraction and Suffix, Aliquot Part, Free Format and Square Feet.

Some case types allow only a certain survey type code to be entered.

Enter a survey type code, if appropriate, and enter all applicable survey data into the Survey fields (Survey Number, Direction, Fraction and Suffix), the Aliquot Part field and the Free Format field. Cursor movement and access to these fields are dependent on the case type and survey type entered. The cursor automatically skips fields not normally entered for a given survey type. If you need to enter data into a skipped field, use PREVIOUS FIELD to move back. Some survey types may require a survey number, an aliquot part or other data; other survey types may simply warn you if you skip fields normally required for that survey type. You may enter up to four lines of survey information for nested surveys (e.g., a lot within a block within a townsite), but most case land descriptions will use only the first line in the Survey fields.

Discuss the relationship between the Square feet and Case Land Acres fields.

The cursor normally skips the Square Feet field, and moves to the Case Land Acres field. For most case land records, enter the number of acres described. To access the Square Feet field, press PREVIOUS FIELD in the Case Land Acres field. You can enter a value in the Square Feet field or the Case Land Acres field, but not both. If you enter a square feet value, the System automatically determines and fills in the value of the Case Land Acres field. While you can type over an automatically calculated case land acres value, the number you enter is replaced by the number automatically calculated from the Square Feet value when you press NEXT FIELD.



Emphasize that the Parcel Code field only displays data for Alaska Native allotment cases.

The Parcel Code field is only for display purposes in Alaska Native Allotment cases and cannot be accessed on this form. If the displayed land description is linked to an `001` (`APPLICATION FILED`) action in an Alaska Native Allotment case, and that action record contains

a parcel code, this code appears in the Parcel Code field of this form. For all other case types, this field is blank.

Discuss how the ROW field is accessible only for ROW cases.

The Right-of-Way Width field is accessible only for right-of-way cases, and is used for the width dimension of a right-of-way corridor described by the case land record. Enter the right-of-way width, if appropriate.

Mention that PREVIOUS FIELD may need to be used to access the District Office field.

The BLM District Office and Resource Area fields may contain codes pulled from the System's LLD data based on the MTRS data entered. If these codes are incorrect or are necessary but missing, enter the appropriate codes. Use the Lists of Values (LOV), if necessary.

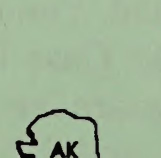
Caution students that the ANCSA field is accessible for all case types but should be used only for Alaska native village and region cases.

The Native Region and ANCSA code fields are for Alaska only. The native region code identifies the native region in which the case land description falls. Enter the region code, if needed. The ANCSA code field is accessible for all case types, but only accepts values for 265xxx cases. ANCSA codes are used to recognize surface/subsurface claims on various estates (e.g., villages and native regions) for the land description. Enter the ANCSA code, if appropriate.

The Administrative Agency field may contain a code pulled from the System's LLD data based on the meridian, township, range and section data entered. If the code is incorrect or is necessary but missing, enter the appropriate code. Use the Lists of Values (LOV), if necessary.

Emphasize that initials are required in Alaska.

Enter your office code and initials, or the office code and initials of the employee who made the decisions regarding this case land description.



Employee Initials are required in Alaska.

Discuss the inaccessible fields on the form.

The Land Status, Change Date and Employee ID fields at the bottom of this form, as well as the Lock Employee Initials and Lock Office Code fields in the upper-right, cannot be accessed. These fields simply display information for your benefit and cannot be updated.

Emphasize that each updated land record must be committed before moving on.

You must COMMIT each new case land record to the database before exiting the form or moving on to add, change or delete other case land records in the case.

Emphasize the importance of making action/land ties immediately after adding new lands to a case.

WARNING:

Immediately after using this form to add new case land records to a case, you should use the Update Action/Land Relationship Form (CASE101F) to link the new land records to the appropriate action(s) in the case. Creating action/land relationships between the newly added case lands and the appropriate action(s) is required for the System to automatically set case land status.

Review the Quirks subsection point by point and summarize the use of the Update Case Land form.

Quirks and special data issues for CASE125F:

- Although this form displays only one case land record at a time, you can retrieve all of the case land records in a case simultaneously and scroll back and forth through them, viewing and working on one at a time.
- If the case's land records are locked, the office code and employee initials of the person who locked them appear in the Lock Employee Initials and Lock Office Code fields on the upper-right of the form just below the Case Type field.
- While you may update a land record linked to an action record(s) without removing the links, you may not entirely delete such a land record.
- Although you can return to the Land Number field, doing so allows you to retrieve only individual case land records. You cannot return to the Land Number field, clear it and requery all of the land records in the case. To requery all of the case's land records, you must press CLEAR FORM, reenter the case serial number and begin again.
- If you are adding a land record that is similar to an existing land description in the case, display the existing record on the form, and press CREATE RECORD followed by DUPLICATE RECORD. A new, duplicate record is generated, and you can move around the page, changing data as needed. This procedure saves reentering identical land information over and over again.
- Once you enter meridian, township and range data, entering a section number is optional; if you leave this field blank, it fills automatically with zeros.

- Depending on the case type and MTRS entered, the System may skip or require various fields on this form, including: Survey Type, Survey Number, Direction, Fraction and Suffix, Aliquot Part, Free Format and Square Feet. If a survey type is entered, cursor movement and access to other Survey fields are dependent on the case type and survey type.
- If you enter a square feet value, the System automatically determines and fills in the value of the Case Land Acres field.
- The Land Status, Change Date and Employee ID fields at the bottom of this form, as well as the Lock Employee Initials and Lock Office Code fields in the upper-right, display information for your benefit and cannot be accessed.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise C-1 *(Update Case Header, Update Customer Link and Update Case Land Records)*

Update Action/Land Menu

5 minutes

Discuss navigation to the Update Action/Land Menu from the Case Processing Menu.

Review the general purpose of each menu option.

Refer to the Case Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

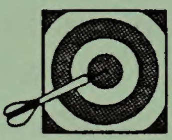
Prompt for and answer questions.

The Update Action/Land Menu option on the Case Processing Menu includes six forms used to add, change and delete action code information, action-to-land relationships, and MMS finance transfer transactions within case(s) in the System. The six forms on this menu maintain non-money action records in cases, their association to case lands within established cases in the System, and MMS finance transfer action records in cases.

NOTE:

The Case Processing Menu option returns you to the menu one level higher in the System from which you can access other options in Case Processing.

Update Action Record Form (CASE127F)



45 minutes

Review the purpose of the Update Action Record form, emphasizing the restrictions that exist for updating.

Purpose and use of the Update Action Record Form:

This form allows you to add, change and delete action information, including action remarks, pending entities, second dates and date types, document types and numbers, parcel codes, etc... related to a specific case. This is the primary form for updating both basic and comprehensive action data in individual cases in the Interim System.

Several restrictions exist concerning the update of action information using this form. Locked action records cannot be changed or deleted. Money action records cannot be added or deleted on this form, and money action codes cannot be changed. Actions records linked to case lands cannot be deleted, and their action codes cannot be changed.

Review who uses this form and why.

BLM personnel responsible for updating action information for individual land or mineral cases in the System use this form to perform their tasks.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE127F program name in QXFER:

The Update Action Record Form (CASE127F) is an option on the Update Action/Land Menu within the Case Processing chapter. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu, and finally the Update Action option from the Update Action/Land Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE127F program name.

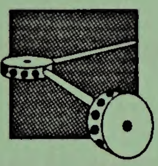
Discuss data required to use this form and the minimum data needed to add an action to a case.

Required Data you must have to use this form:

- Case Serial Number.
- Action information for a data update (addition, change or deletion) you wish to make in any of the other fields on this form.
- Employee Initials (Alaska only).

NOTE:

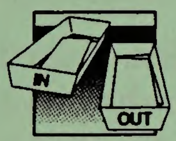
When adding a new action, the action code, action date and employee initials are required as a minimum. Your state may also require a pending entity code for certain case type/action code combinations.



Review this form's basic structure and the types of data that can be entered, changed and deleted.

Structure of the form:

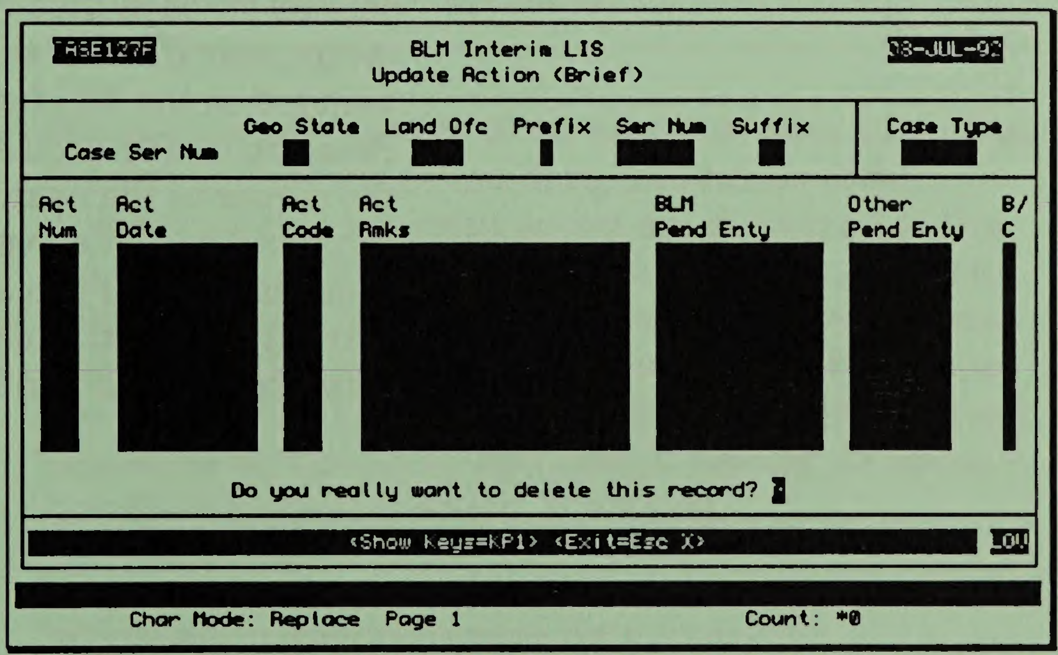
The Update Action Record Form consists of two pages (one Brief and one Comprehensive) containing fields specifically related to the actions in an individual case. The Brief page allows you to specify the case serial number and update basic action record information (e.g., action date and code, action remarks, etc...). The Comprehensive page allows you to specify employee initials and office code, as well as more involved action data (e.g., second date information, document information, parcel code, etc...).



Review and demonstrate the step-by-step workflow for the Update Action form.

Use the available training aids as needed.

Work flow within this form and a review of the form's pages and fields:



STEP 1

Enter a valid case serial number in the top block of fields on page 1 (Brief page). Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Mention that up to eight actions are displayed in action date order on Page 1.

The System retrieves and displays the case type of the specified case to the right of the case serial number, and displays brief action record data for the first eight actions in the case in the lower block of fields. Actions are displayed in order by action date.

STEP 2

To change an existing action record, move the cursor around on the Brief page (page 1), adding, changing and deleting brief data as needed.

Review and discuss each of the data elements on Page 1 and demonstrate the process of changing data in an existing action record using Pages 1 and 2.

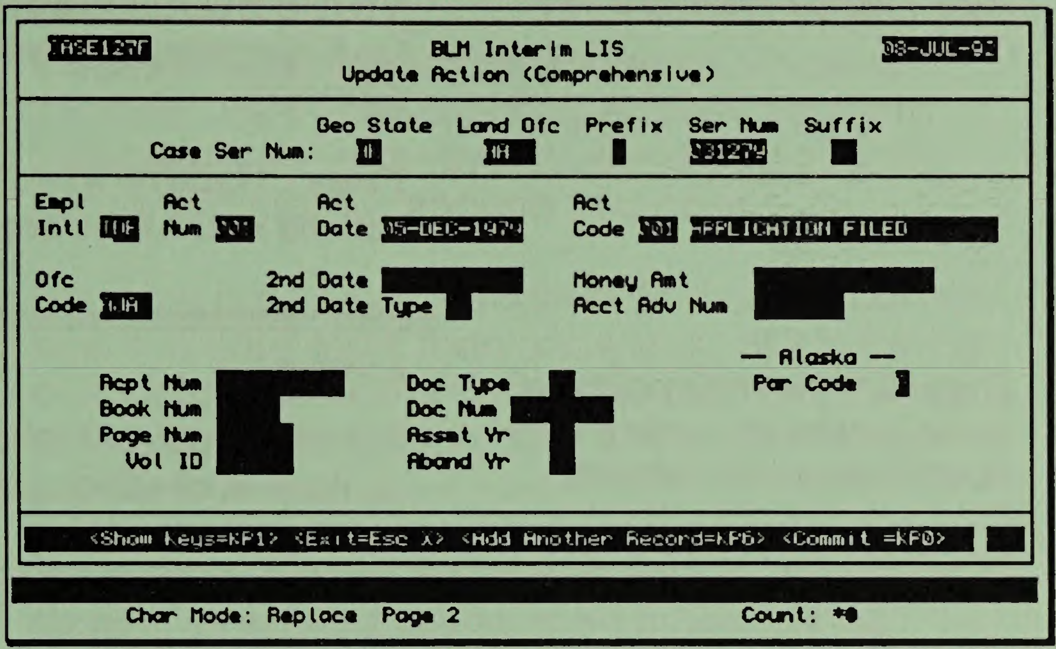
Emphasize that locked records cannot be changed. Demonstrate how to view the Office Code and Initials of an employee who has locked actions in a case.

NOTE:

Locked action records cannot be changed. The office code and initials of the person who locked actions in a case are displayed on the Comprehensive page (page 2) for the one **920** action code (**ACTION RECORDS LOCKED**) in the case. Only one **920** action can exist in a case. When actions are unlocked, this action record is automatically deleted from the case.

Discuss the B/C field and how users are forced to the Employee Initials field on Page 2 if any changes are made.

The B/C field in each action record on page 1 allows you to move to the Comprehensive page (page 2) and enter more detailed data for that action. The field's default for each case type/action code combination is set by your BLM State Office. Pressing NEXT FIELD with a **C** in the B/C field moves the cursor to page 2. Pressing NEXT FIELD with a **B** in the B/C field moves the cursor to the next record (possibly a new record) on page 1 only if no values in the current record have been changed. If you alter data in any field of the current record, this form forces you to page 2 so that employee initials can be entered.



Demonstrate NEXT/PREVIOUS BLOCK to move between Pages 1 and 2.

NOTE:

For all existing actions, you may use NEXT/ PREVIOUS BLOCK at any time (regardless of the letter in the B/C field) to move quickly between pages 1 and 2 within the current record. NEXT BLOCK moves you from page 1 to page 2 just as if c was entered in the B/C field.

Review and discuss each of the data elements on Page 2, emphasizing which are not accessible and which are accessible for only certain case types.

The case serial number of the specified case, as well as the action number, action date, and action code/ description of the current action are displayed at the top of page 2 in display-only fields. Cursor movement and field access on page 2 are determined by the case type and action code of the current record. The Money Amount and Accounting Advice Number fields are not accessible on this form, and simply display financial data for the current action, if present.

Move the cursor around on page 2, adding, changing and deleting comprehensive data as needed.

Emphasize that Employee Initials must be entered in Alaska for all action updates.

The initials of the employee authorizing an update are required in Alaska, and you cannot move to another action record or COMMIT changes to the current record until employee initials are entered.

Demonstrate how to return to Page 1 without creating a new record.

To return to the current record on page 1, press PREVIOUS BLOCK. To scroll to the next action record (and automatically return to page 1), press NEXT RECORD.

Press COMMIT when the necessary changes to all actions in the case are complete.

Emphasize that action codes of money actions and actions tied to lands cannot be changed.

NOTE:
The action codes of both money actions and actions related to case lands cannot be changed.

STEP 3

Demonstrate and discuss the process of deleting existing action records from both pages.

Emphasize that COMMIT must be pressed after DELETE RECORD.

To delete an existing action, move to the appropriate record on page 1 and press DELETE RECORD. The cursor moves to the Do you really want to delete this record? field. Enter **Y** and press NEXT FIELD to remove the record from the form. Although the record disappears, it is not truly deleted from the database until you press COMMIT. Enter **N** and press NEXT FIELD to cancel the deletion. If you press DELETE RECORD on page 2, the cursor returns to the current record on page 1; press DELETE RECORD a second time to move to the Do you really want to delete this record? field.

Press COMMIT to delete the actions removed on this form from the case.

Emphasize that locked actions, money actions and actions tied to lands cannot be deleted.

!

WARNING:
You cannot delete locked action records, money actions, or actions linked to case lands.

STEP 4

Demonstrate and discuss the process of adding new action records to a case.

To add a new action record, press CREATE RECORD on either page 1 or 2. The System automatically generates the next sequential action number for the case, and the cursor moves to the Action Date field on page 1 for the new action. NEXT RECORD can also be used to create a new record when the cursor is on the last action in the case.

Emphasize that money actions cannot be added with this form and that certain duplicate actions are not accepted for some case types.

NOTE:

Money actions cannot be added to a case with this form. Use the Accounting Advice - Random Serial Numbers Form (CASE162F) to add actions containing money amounts to a case.

For some case types, certain action codes cannot exist in a case more than once (e.g., B52 in mining claim cases). An error occurs if you attempt to add a duplicate code under these conditions.

Demonstrate and discuss using CREATE RECORD and DUPLICATE RECORD to save reentering identical values over and over again.

If you are adding an action with field values similar to those of an existing action, move to the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can add, change and delete data as needed. This procedure can save you from having to reenter identical action information over and over again.

Remind students that action codes are case type sensitive, and that action dates cannot be earlier than a lock action date in the case.

Review the information found on the action code LOV.

Enter the required action date and code for the record. Remember that the case type determines which action codes are valid, and that action dates cannot be earlier than the date of a lock action, if present. Use the List of Values (LOV) available in the Action Code field, if necessary. The action code LOV indicates if action codes are money actions, effect case status, allow second date types (and, if so, which ones), require pending entities, etc....

Mention that some case type/ action combinations require structured remarks.

Enter action remarks, if appropriate, and the BLM or other pending entity code for the action.

Explain that Page 2 must be accessed to enter Employee Initials.

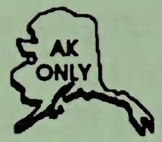
Move to the Comprehensive page (page 2) by entering C in the B/C field or pressing NEXT BLOCK. If you enter B in the B/C field to move to the next record on page 1, this form forces you to page 2 so that employee initials can be entered.

The serial number of the case, as well as basic action data entered on page 1 for the current action are displayed at the top of page 2 in display-only fields.

Remind students that some fields are inaccessible and others are only accessible for certain case types. Briefly review each data element found on Page 2.

Cursor movement and field access on page 2 are determined by the case type/action code of the current record. The Money Amount and Accounting Advice Number fields are not accessible on this form, and remain blank for new records.

Enter your office code and initials or the office code and initials of the employee who made the decisions regarding this action record.



The initials of the employee authorizing a new action are required in Alaska.

Thoroughly discuss the concept of second dates and date types.

Explain and demonstrate using the Second Date Type LOV when only code 70 appears.

If accessible and appropriate, enter a second date and second date type code that describe the completion of the action identified by the action code. You may enter a second date type without entering a second date, but not vice versa. Use the List of Values (LOV) available in the Second Date Type field, if necessary. Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of 70. This code indicates that more than one second date type is acceptable for this case type/action code combination. Press NEXT FIELD with the cursor on the 70 to move to a LOV screen listing the acceptable second date type codes.

Thoroughly discuss document type/numbers and their relationship to AALRS data elements. Refer to the AALRS - Interim System Land Status Comparison wall display.

If appropriate, enter the county courthouse or recording district reception number, book number, page number and/or volume ID assigned to the recorded document identified by the action.

If appropriate, enter the document type code and document number that identify the document being issued with this action. You may enter a document type without entering a document number, but not vice versa.

In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

Emphasize that assessment and abandonment year are entered only for specific actions in mining claim cases.

If this is a mining claim case type, and if appropriate for the current action, enter assessment year and/or abandonment year data.

If this is an Alaska Native Allotment case, enter the appropriate parcel code for this record, if appropriate.

Emphasize that parcel codes are entered only for land actions in Alaska Native Allotment cases.

Press COMMIT in the last accessible field on page 2 to save your additions, or press CREATE RECORD or NEXT FIELD to create a new record and move the cursor to the Action Date field on page 1.

Demonstrate how to create another new record, COMMIT, or return to the current record on Page 1.

To return to the current record on page 1 without creating a new record, press PREVIOUS BLOCK. To scroll to the next or previous existing action record, press NEXT/PREVIOUS RECORD.

Emphasize that no warning is provided if EXIT is pressed before COMMIT.

WARNING:
If you exit the form before committing action updates, the data is not save. The System does not ask you if you want to commit your work before exiting.

Review the Quirks subsection point by point and briefly summarize the use of the Update Action form.

Quirks and special data issues for CASE127F:

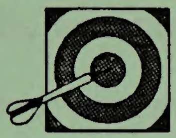
- This form displays all previously entered action information for the current case once you enter the case serial number. You can then add new action records, or update or delete existing records.
- Several restrictions exist concerning the update of action information using this form. Locked action records cannot be changed or deleted. Money action records cannot be added or deleted on this form, and money action codes cannot be changed. Actions records linked to case lands cannot be deleted, and their action codes cannot be changed.
- When adding a new action, action code, action date and employee initials are required as a minimum. Your state may also require a pending entity code for certain case type/action code combinations.
- If actions are locked in a case, the office code and initials of the person who locked them are displayed on the Comprehensive page (page 2) for the one `920` `action code (ACTION RECORDS LOCKED)` in the case. Only one `920` action can exist in a case. When actions are unlocked, this action record is automatically deleted from the case.
- The B/C field's default for each case type/action code combination is set by your BLM State Office. Pressing NEXT FIELD with a `C` in the B/C field moves the cursor to page 2. Pressing NEXT FIELD with a `B` in the B/C field moves the cursor to the next record on page 1 only if no values in the current record have

been changed. If you alter data in any field of the current record, this form forces you to page 2 so that employee initials can be entered.

- For all existing actions, you may use NEXT/PREVIOUS BLOCK at any time (regardless of the letter in the B/C field) to move quickly between pages 1 and 2 within the current record.
- Cursor movement and field access on page 2 are determined by the case type and action code of the current record. The Money Amount and Accounting Advice Number fields are not accessible on this form, and simply display financial data for the current action, if present.
- After pressing DELETE RECORD and entering `Y` in the Do you really want to delete this record? field, you must press COMMIT to truly delete an action record from a case.
- Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of `70`. This code indicates that more than one second date type is acceptable for this case type/action code combination.
- In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.
- If you exit the form before committing action updates, the data is not save. The System does not ask you if you want to commit your work before exiting.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Add Action - Brief Form (CASE128F)



15 minutes

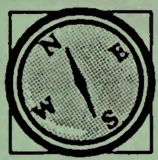
Review the purpose of the Add Action - Brief form, emphasizing the restrictions that exist for updating.

Review who uses this form and why.

Purpose and use of the Add Action - Brief Form:

This form allows you to add brief action information to one or more established cases simultaneously. Brief action data includes: action code, action date, parcel code, BLM pending entity, other pending entity, document type and number, action remarks, assessment year and abandonment year.

BLM personnel responsible for adding brief action information to one or more existing cases in the System simultaneously use this form to perform their tasks.



Review navigation to this form (including QXFER).

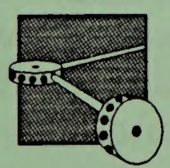
Navigation to this form and use of CASE128F program name in QXFER:

The Add Action - Brief Form (CASE128F) is an option on the Update Action/Land Menu within the Case Processing chapter. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu, and finally the Update Action - Brief option from the Update Action/Land Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE128F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Geographic State (for all he case serial numbers entered on the form).
- Employee Initials (Alaska only).
- Land Office and Serial Number (of each individual case serial number to which action data is added).
- Action Code and Action Date

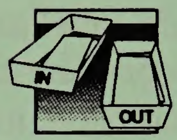


Review this form's basic structure and the types of data that can be entered, retrieved and updated.

Structure of the form:

The Add Action - Brief Form consists of one page displaying three records, each specifically related to brief action information in an established case. Each record can be used to add brief action data to a specified case. Although only three brief action records

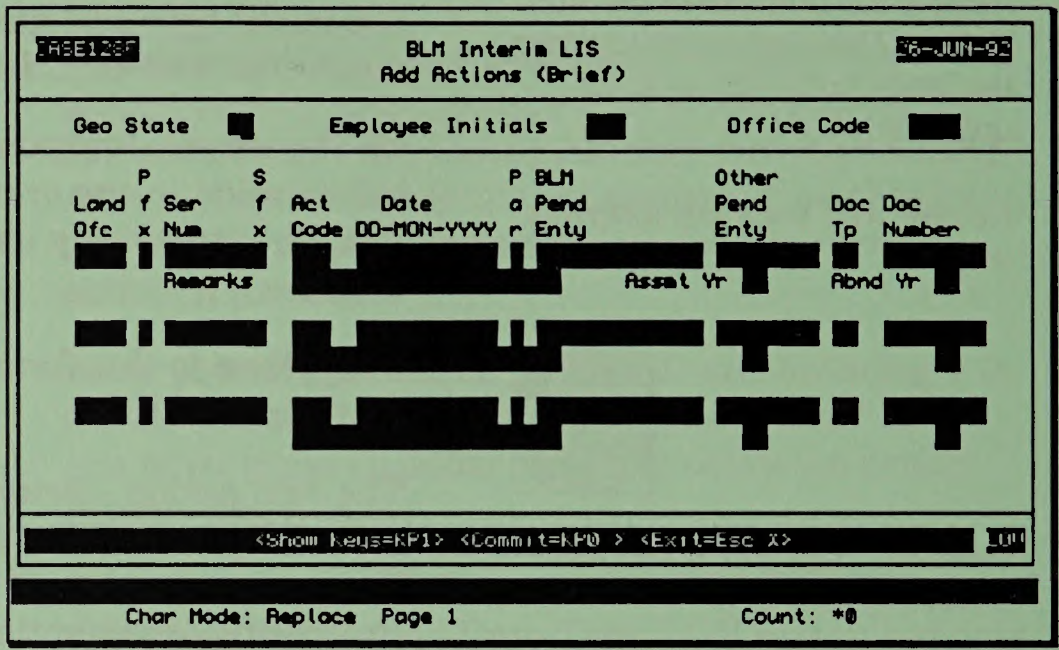
appear on this form, more than three can be entered; as additional records are added, information in the displayed records scrolls up and off the form.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Update Action - Brief form.

Use the available training aids as needed.



STEP 1

Explain that each serial number entered must have the same geographic state abbreviation and that all actions added receive the initials and office code entered at the top of the form.

Each case serial number specified during one session on this form must begin with the same geographic state abbreviation. Enter the required Geographic State abbreviation in the block of fields at the top of the form. Use the available List of Values (LOV), if necessary.

Demonstrate and discuss LOV where available.

Each action record added during one session on this form receives the same employee initials and, if entered, office code. Enter your initials (required) and office code (optional), or those of the employee who authorized the entry of the action data added on this form, in the block at the top of the form.

STEP 2

Enter a valid case serial number (excluding the previously entered geographic state abbreviation) to which brief action data is to be added. Use the List of Values (LOV) available in the Land Office field, if needed. The geographic state of this case serial number must match the abbreviation entered in the block at the top of this form.

Mention that the Serial Number and Prefix fields are combined.

NOTE:

The Serial Number and Suffix fields of the case serial number are combined on this form to save space. Although they look like a single field, they function just like two separate fields; use NEXT/ PREVIOUS FIELD to move between them.

STEP 3

Remind students that action codes are case type sensitive.

Enter the required action code and date for the action to be added to the case specified in this record. Remember that the case type determines which action codes are valid. Use the List of Values (LOV) available in the Action Code field, if necessary.

Briefly describe how to use DUPLICATE RECORD to save time and effort.

NOTE:

If you are adding an additional brief action record to the same case or an action record that has field values similar to those of the last record entered on this form, move the cursor to the last record, and press NEXT RECORD followed by DUPLICATE RECORD. A new, duplicate record is generated, and you can use the appropriate function keys to move the cursor through the fields, adding, changing and deleting data as needed. This procedure can save you from having to reenter identical serial numbers or action information over and over again.

Mention that parcels can only be added to Alaska Native Allotment cases.

If this is an Alaska Native Allotment case type, and if this action applies to a specific parcel within the case specified in this record, enter the appropriate parcel code. If you enter a parcel code for a case that is not an Alaska native allotment, an error message is displayed.

If appropriate, enter the BLM pending entity or other pending entity code that identifies the office currently handling this action for the case. Use the Lists of Values (LOV) available in the BLM Pending Entity and Other Pending Entity fields, if necessary.

Remind students that only one of the Pending Entity fields can be used per record.

NOTE:
You may not enter codes for both a BLM and other pending entity. When you enter a value in one of these fields and press NEXT FIELD, the other is automatically cleared.

Mention that document type can be entered without a number, but not the other way around.

Briefly review how AALRS data relates to document type/ number.

If appropriate, enter the document type code and number that identifies the document being issued with this action. Use the List of Values (LOV) field available in the Document Type field, if necessary. You may enter a document type without entering a document number, but not vice versa.

The two-character Document Type field and the eight-character Document Number field in the Interim System are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

If appropriate, enter action remarks for this record. Since action codes frequently require structured action remarks, check Data Element 1775 to ensure correct entries in this field.

Mention that the Assessment and Abandonment fields are accessible only for Mining Claim cases.

The Assessment Year and Abandonment Year fields are accessible only for specific actions being added to mining claim cases. If this is a mining claim case, and if appropriate for the current action, enter the assessment year or abandonment year.

STEP 4

If you want to move to the next record and entering another brief action record, press NEXT FIELD or NEXT RECORD. You may scroll through the list of records you have entered using NEXT/PREVIOUS RECORD, and remove records from the form (before pressing COMMIT) using CLEAR RECORD.

Press COMMIT to add the action information entered on this form to the specified case(s) in the database.

Emphasize the need to COMMIT additions before exiting the form.

NOTE:
Always COMMIT additions before exiting the form. If you press EXIT without committing entered data, the System does not display a warning message or ask you if you want to save your additions before exiting.

When you press COMMIT, the following message is displayed:

```
Transaction completed -- X records pro-
cessed.
```

Press EXIT to return to a menu or CLEAR FORM to clear the form's fields and enter another set of brief action records.

WARNING:

After you press COMMIT and save your additions, the information displayed on the form is not cleared. Press CLEAR FORM or EXIT to avoid creating duplicate actions in the identified cases. While it is possible to edit (and clear) these saved records, add new brief action records, and recommit this information without clearing the form or exiting, the danger of duplicating actions in cases is extreme.

Warn students that entered data are not cleared from the form after COMMIT and emphasize the danger of inadvertently adding incorrect actions to cases as a result.

Quirks and special data issues for CASE128F:

Review the Quirks subsection point by point and briefly summarize the use of the Update Action - Brief form.

- Brief action data includes: action code, action date, parcel code, BLM pending entity, other pending entity, document type and number, action remarks, assessment year and abandonment year.
- Each case serial number specified during one session on this form must begin with the same geographic state abbreviation.
- Each action record added during one session on this form receives the same employee initials and, if entered, office code.
- The Serial Number and Suffix fields of the case serial number are combined on this form to save space. Although they look like a single field, they function just like two separate fields; use NEXT/ PREVIOUS FIELD to move between them.
- If you are adding an additional brief action record to the same case, or an action record that has field values similar to those of the last record entered on this form, move the cursor to the last record, and

press NEXT RECORD followed by DUPLICATE RECORD. This procedure can save you from having to reenter identical data over and over again.

- Although the Parcel Code field is always accessible, an error message is displayed if you enter a parcel code for a case that is not an Alaska native allotment.
- You may not enter codes for both a BLM and other pending entity. When you enter a value in one of these fields and press NEXT FIELD, the other is automatically cleared.
- The two-character Document Type field and the eight-character Document Number field in the Interim System are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.
- The Assessment Year and Abandonment Year fields are accessible only for specific actions being added to mining claim cases.
- If you press EXIT without committing entered data, the System does not display a warning message or ask you if you want to save your additions before exiting.
- After you press COMMIT and save your additions, the information displayed on the form is not cleared. Press CLEAR FORM or EXIT to avoid creating duplicate actions in the identified cases. While it is possible to edit (and clear) these saved records, add new brief action records, and recommit this information without clearing the form or exiting, the danger of duplicating actions in cases is extreme.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Update Action - Range of Serial Numbers Form (CASE145F)

1 hour
(including Exercise C-2)

Review the purpose of the Update Action - Range of Serial Numbers form, emphasizing the restrictions that exist for updating.

Purpose and use of the Update Action - Range Serial Numbers Form:

This form allows you to add, change and delete action information, including action remarks, pending entities, second dates and date types, document types and numbers, parcel codes, etc... for individual cases within a sequential range of cases.

After specifying a range of cases, you work on one case at a time, in sequential serial number order within the range. This form's primary purpose is to provide a convenient method for updating actions in multiple cases, one at a time and one right after the other, without having to enter the serial numbers of each case in the range.

Several restrictions exist concerning the update of action information using this form. Locked action records cannot be changed or deleted. Money action records cannot be added or deleted on this form, and money action codes cannot be changed. Actions records linked to case lands cannot be deleted, and their action codes cannot be changed.

Review who uses this form and why.

BLM personnel responsible for updating actions in individual cases within a set of sequentially serialized land or mineral cases in the System use this form to perform their tasks.

If appropriate for students, review the differences between CASE145F and CASE153F.

NOTE:
This form (CASE145F) is significantly different from the Add Action Records to a Range of Serial Numbers Form (CASE153F). CASE145F allows you to cycle through cases within a designated range one at a time, allowing you to add, change or delete action records within individual cases. Updates within one serialized case in CASE145F have no effect on any other case within the range. CASE153F allows you only to add action records specified on the form simultaneously to the cases within the designated range. The action records entered on CASE153F are added, across the board, to all cases within the range.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE145F program name in QXFER:

The Update Action - Range of Serial Numbers Form (CASE145F) is an option on the Update Action/Land Menu within the Case Processing chapter. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu and finally the Update Action (Range of Serial Numbers) option from the Update Action/Land Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE145F program name.

Discuss data required to use this form and the minimum data needed to add an action to a case.

Required Data you must have to use this form:

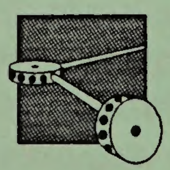
- The Lower and Upper Limits of a sequential range of Case Serial Numbers.
- Information for action data updates (additions, changes or deletions) you wish to make in any of the accessible fields on this form within individual cases in the specified range.
- Employee Initials (Alaska only).

Emphasize that updates are not required in every case within the range.

NOTE:

You are not required to make action updates in every case within the specified range. You can skip over any case(s) in the range, as needed.

When adding a new action to a case, the action code, action date and employee initials are required as a minimum. Your state may also require a pending entity code for certain case type/action code combinations.

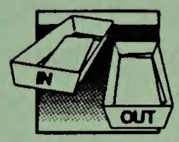


Review this form's basic structure and the types of data that can be retrieved, changed and deleted.

Structure of the form:

The Update Action - Range of Serial Numbers Form consists of three pages. Page 1 allows you to enter the lower and upper limit of the sequential serial number range. Pages 2 and 3 (Brief and Comprehensive action pages) contain fields specifically related to actions in an individual case within the range. The Brief page

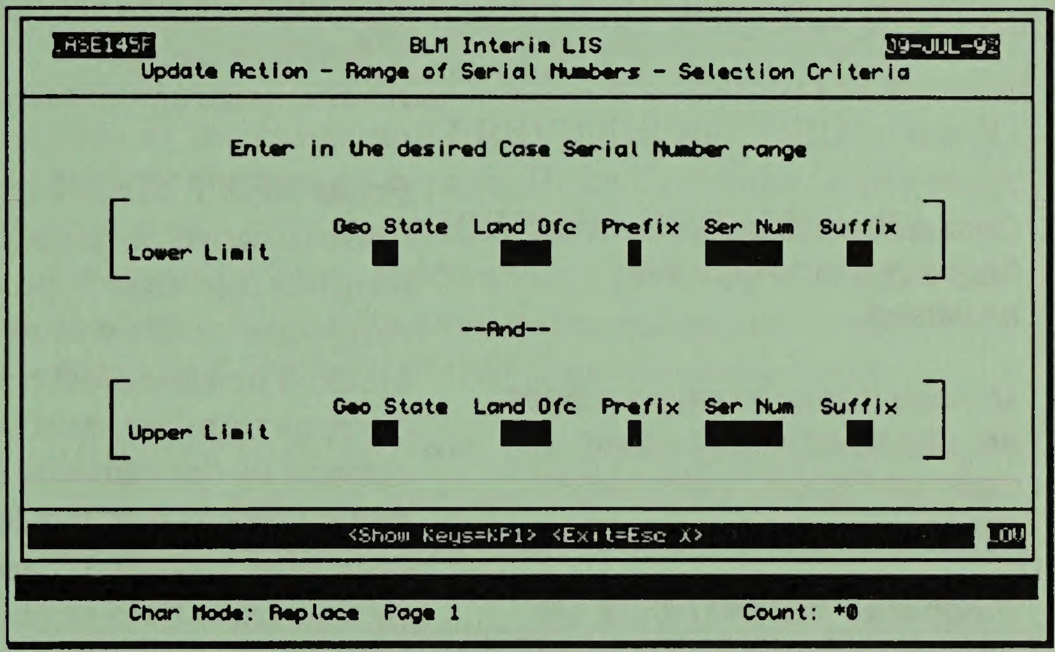
allows you to update basic action record information (e.g., action date and code, action remarks, etc...). The Comprehensive page allows you to specify employee initials and office code, as well as more involved action data (e.g., second date information, document information, parcel code, etc...). The structure and functionality of this form's brief and comprehensive pages are virtually identical to the Brief and Comprehensive pages of the Update Action Form.



Work flow within this form and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the Update Action - Range of Serial Numbers form.

Use the available training aids as needed.



STEP 1

Enter the lower and upper limits of the sequential range of case serial numbers in the two groups of fields on page 1. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Values in the inaccessible Geographic State and Land Office fields for the upper limit automatically default to the those entered for the lower limit.

Demonstrate and discuss LOV where available.

Mention that the geographic State and Office Code fields of the upper limit default to those entered for the lower limit.

NOTE:

Explain what serial numbers are and are not acceptable.

The specified range must contain at least one valid serial number. Invalid and voided serial numbers can fall within the range, and are also accepted as the range's lower and upper limits. Invalid serial numbers are skipped automatically as you scroll through cases in the range, one at a time. If you reach a voided case, the cursor appears in the current serial number's Geographic State field on page 2, and a message appears indicating that no actions exist for the case. You cannot update actions in voided cases. Press NEXT/PREVIOUS BLOCK to scroll to another case within the range.

Demonstrate and discuss what happens when Page 2 is accessed.

Mention that up to seven actions are displayed in action date order on Page 2 for the current case.

Emphasize that two blocks are normally accessible: the current serial number block and the action record block. Demonstrate moving between the blocks.

Press NEXT FIELD in the Suffix field of the upper limit to move to page 2 (Brief action page). The serial number and case type of the first valid case in the range are displayed in the current serial number block. The specified range is displayed below the current number, and brief data for the first seven actions in the current case are displayed in the action record block. Actions are displayed in order by action date. For unvoided cases, the cursor appears in the Action Date field of the first action record. For voided cases, the cursor appears in the current serial number's Geographic State field.

STEP 2

You are not required to make action updates in every case within the specified range. You can skip over any case(s) in the range, as needed.

Thoroughly discuss how to scroll among the cases within the range, emphasizing the use of NEXT/PREVIOUS RECORD as well as COMMIT.

There are two ways to scroll through the range of cases and change the current case.

First, the next case within the range is automatically accessed when you press COMMIT after making updates to a case's actions. The updates are saved in the database, and the next sequential, valid serial number becomes current.

Second, move the cursor to the Geographic State field in the current serial number block on page 2 (press PREVIOUS BLOCK in the action record block, if necessary). Press NEXT RECORD to scroll to the next case in the range and PREVIOUS RECORD to scroll back to the previous case. If the first case in the range is current, pressing PREVIOUS RECORD in the Geographic State field returns the cursor to page 1 of the form. If the last case in the range is current, pressing NEXT RECORD does the same thing.

Mention that Page 1 can be accessed from the first and last cases in the range using NEXT/ PREVIOUS RECORD (or CLEAR FORM).

To move the cursor from the Geographic State field in the current serial number block to the action record block, press NEXT BLOCK.

NOTE:
If you make updates in a case and attempt to scroll to another case in the range without committing, the System asks if you want to save data before moving on.

Mention that the System asks if you want to save updates if you do not press COMMIT before attempting to move to another case.

STEP 3

To change an existing action record in the current case, move the cursor around on the Brief page (page 2), adding, changing and deleting brief data as needed.

Demonstrate the process of changing data in an existing action in the current case using Pages 2 and 3.

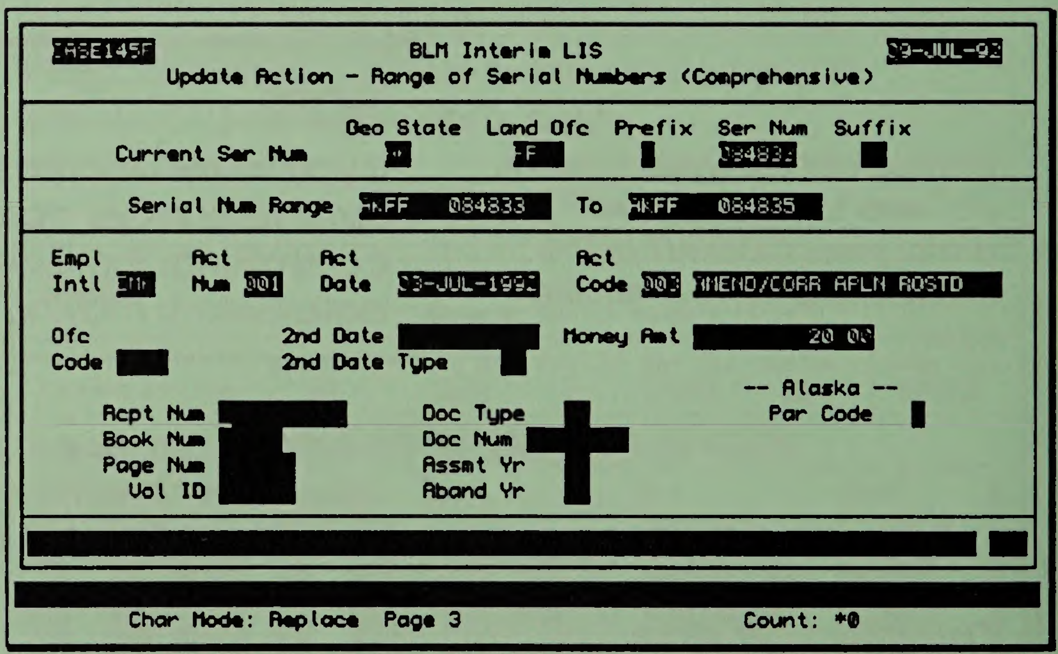
Emphasize that locked records cannot be changed. Demonstrate how to view the office code and initials of an employee who has locked the actions in a case.

NOTE:

Locked action records cannot be changed. The office code and initials of the person who locked actions in a case are displayed on the Comprehensive page (page 3) for the one **920** `action code` (**ACTION RECORDS LOCKED**) in the case. Only one **920** action can exist in a case. When actions are unlocked, this action record is automatically deleted from the case.

Discuss the B/C field and how users are forced to the Employee Initials field on Page 3 if any changes are made.

The B/C field in each action record on page 2 allows you to move to the Comprehensive page (page 3) and enter more detailed data for that action. The field's default for each case type/action code combination is set by your BLM State Office. Pressing NEXT FIELD with a **C** in the B/C field moves the cursor to page 3. Pressing NEXT FIELD with a **B** in the B/C field moves the cursor to the next record (possibly a new record) on page 1 only if no values in the current record have been changed. If you alter data in any field of the current record, this form forces you to page 3 so that employee initials can be entered.



Demonstrate NEXT/PREVIOUS BLOCK to move between Pages 2 and 3.

NOTE:

For all existing actions, you may use NEXT/ PREVIOUS BLOCK at any time (regardless of the letter in the B/C field) to move quickly between pages 2 and 3 within the current record. NEXT BLOCK moves you from page 2 to page 3 just as if **C** was entered in the B/C field.

Review and discuss each of the data elements on Page 3, emphasizing which are not accessible and which are accessible for only certain case types.

The current serial number and the serial number range, as well as the action number, action date, and action code/description of the current action are displayed at the top of page 3 in display-only fields. Cursor movement and field access on page 3 are determined by the case type and action code of the current record. The Money Amount field is not accessible on this form, and simply displays financial data for the current action, if present.

Move the cursor around on page 3, adding, changing and deleting comprehensive data as needed.

The initials of the employee authorizing an update are required in Alaska, and you cannot move to another action record or COMMIT changes to the current record until employee initials are entered.

Emphasize that employee initials must be entered in Alaska for all action updates.

Demonstrate how to return to Page 2 without creating a new record.

To return to the current record on page 2, press PREVIOUS BLOCK. To scroll to the next action record (and automatically return to page 2), press NEXT RECORD.

Explain what happens when COMMIT is pressed.

Press COMMIT when the necessary changes to all actions in the case are complete. The cursor moves to the Action Date field of the next case in the range, or (if this was the last case in the range) moves to the first Geographic State field on page 1.

Emphasize that action codes of many actions and actions tied to lands cannot be changed.

NOTE:

The action codes of money actions and actions related to case lands cannot be changed.

Demonstrate how to delete an action on this form, emphasizing that COMMIT is not required.

STEP 4

To delete an existing action, move to the appropriate record on page 2 and press DELETE RECORD. The cursor moves to the Do you really want to delete this record? field. Enter Y and press COMMIT to delete the

Emphasize that locked actions, money actions and actions tied to lands cannot be deleted.

record from the current case. Enter **N** and press COMMIT to cancel the deletion. You cannot delete a record from page 3; all deletions must be processed on page 2.

!

WARNING:

You cannot delete locked action records, money actions, or actions linked to case lands.

STEP 5

To add a new action record to the current case, press CREATE RECORD on either page 2 or 3. A blank record is added, and the cursor moves to the Action Date field on page 2 in the new action. NEXT RECORD can also be used to create a new record when the cursor is on the last action in the case.

Demonstrate the process of adding new action records to a case.

Mention that action numbers are generated on this form after COMMIT.

NOTE:

Action numbers are not generated on this form when records are created. Action numbers are generated for new actions only when COMMIT is pressed to save updates for the current case.

Emphasize that money actions cannot be added with this form and that certain duplicate actions are not accepted for some case types.

Money actions cannot be added to a case with this form. Use the Accounting Advice - Random Serial Numbers Form (CASE162F) to add actions containing money amounts to a case.

For some case types, certain action codes cannot exist in a case more than once (e.g., B52 in mining claim cases). An error occurs if you attempt to add a duplicate code under these conditions.

Review how to use CREATE RECORD and DUPLICATE RECORD to save reentering the same values over and over again.

If you are adding an action with field values similar to those of an existing action, move to the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can add, change and delete data as needed. This procedure can save you from having to reenter identical action information over and over again.

Remind students that action codes are case type sensitive, and that action dates cannot be earlier than a lock action date in the case.

Enter the required action date and code for the record. Remember that case type determines valid actions, and that actions cannot be dated earlier than a lock action date, if present. Use the List of Values (LOV) available in the Action Code field, if necessary. The

Review the information found on the Action Code LOV.

action code LOV indicates if action codes are money actions, effect case status, allow second date types (and, if so, which ones), require pending entities, etc....

Mention that some case type/ action combinations require structured remarks.

Enter action remarks, if appropriate, and the BLM or other pending entity code for the action.

Move to the Comprehensive page (page 3) by entering **C** in the B/C field or pressing NEXT BLOCK. If you enter **B** in the B/C field to move to the next record on page 2, this form forces you to page 3 so that employee initials can be entered.

The current serial number and the serial number range, as well as basic action data entered on page 2 for the current action are displayed at the top of page 3 in display-only fields.

Remind students that some fields are inaccessible and others are accessible only for certain case types. Briefly review each data element on Page 3.

Cursor movement and field access on page 3 are determined by the case type and action code of the current record. The Money Amount field is not accessible on this form, and remains blank for new records.

Emphasize that scrolling among cases in the range can only be done from the Geographic State field in the current serial number block on Page 2.

NOTE:

You cannot scroll to other cases in the specified range from page 3. To access other cases, use PREVIOUS BLOCK and return to the Geographic State field in the current serial number block on page 2, then press NEXT/PREVIOUS RECORD.

Enter your office code and initials or the office code and initials of the employee who made the decisions regarding this action record.

The initials of the employee authorizing a new action are required in Alaska.

Thoroughly discuss the concept of second dates and date types.

Explain and demonstrate using the Second Date Type LOV when only code 70 appears.

If accessible and appropriate, enter a second date and second date type code that describe the completion of the action identified by the action code. You may enter a second date type without entering a second date, but not vice versa. Use the List of Values (LOV) available in the Second Date Type field, if necessary. Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of 70. This code indicates that more than one second date type is acceptable for this case type/

action code combination. Press NEXT FIELD with the cursor on the 70 to move to a LOV screen listing the acceptable second date type codes.

If appropriate, enter the county courthouse or recording district reception number, book number, page number and/or volume ID assigned to the recorded document identified by the action.

Thoroughly discuss document type/numbers and their relationship to AALRS data elements. Refer to the AALRS - Interim System Land Status Comparison wall chart.

If appropriate, enter the document type code and document number that identify the document being issued with this action. You may enter a document type without entering a document number, but not vice versa.

In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

Emphasize that assessment and abandonment year data are entered only for specific actions in mining claim cases.

If this is a mining claim case type, and if appropriate for the current action, enter assessment year and/or abandonment year data.

If this is an Alaska Native Allotment case, enter the appropriate parcel code for this record, if appropriate.

Emphasize that parcel codes are entered only for land actions in Alaska Native Allotment cases.

Press COMMIT in the last accessible field on page 3 to save your data and generate action numbers for each new record added to the current case. The cursor moves to the Action Date field of the next case in the range, or (if this was the last case in the range) moves to the first Geographic State field on page 1.

Demonstrate what happens when COMMIT is pressed as well as how to create another new record or return to the current case on Page 2.

Press CREATE RECORD to create a new action record in the current case and move the cursor to the Action Date field on page 2.

To return to the current record on page 2 without creating a new record, press PREVIOUS BLOCK or NEXT FIELD. To scroll to the next or previous existing action record, press NEXT/PREVIOUS RECORD.

Emphasize that no warning is provided if EXIT is pressed before COMMIT.

WARNING:

If you exit the form before committing action updates, the data is not saved. The System does not ask you if you want to commit your work before exiting.

Review the Quirks subsection point by point and briefly summarize the use of the Update Action - Range of Serial Numbers form.

Quirks and special data issues for CASE145F:

- This form's primary purpose is to provide a convenient method for updating actions in multiple cases, one at a time and one right after the other, without having to enter the serial numbers of each case in the range.

- This form (CASE145F) is significantly different from the Add Action Records to a Range of Serial Numbers Form (CASE153F). CASE145F allows you to cycle through cases within a designated range one at a time, allowing you to add, change or delete action records within individual cases. Updates within one serialized case in CASE145F have no effect on any other case within the range. CASE153F allows you only to add action records specified on the form simultaneously to the cases within the designated range. The action records entered on CASE153F are added, across the board, to all cases within the range.

- This form displays all previously entered action information for the current case within the range of serial numbers. You can then add new action records, or update or delete existing records.

- Several restrictions exist concerning the update of action information using this form. Locked action records cannot be changed or deleted. Money action records cannot be added or deleted on this form, and money action codes cannot be changed. Action records linked to case lands cannot be deleted, and their action codes cannot be changed.

- You are not required to make action updates in every case within the specified range. You can skip over any case(s) in the range, as needed.

- When adding a new action to a case, the action code, action date and employee initials are required as a minimum. Your state may also require a pending entity code for certain case type/action code combinations.

- The specified range must contain at least one valid serial number. Invalid and voided serial numbers can fall within the range, and are also accepted as the range's lower and upper limits. Invalid serial numbers are skipped automatically as you scroll

through cases in the range, one at a time. If you reach a voided case, the cursor appears in the current serial number's Geographic State field on page 2, and a message appears indicating that no actions exist for the case. You cannot update actions in voided cases. Press NEXT/PREVIOUS BLOCK to scroll to another case within the range.

- There are two ways to scroll through a range of cases. First, the next case within the range is automatically accessed when you press COMMIT after making updates to a case's actions. Second, move the cursor to the Geographic State field in the current serial number block on page 2 (press PREVIOUS BLOCK in the action record block, if necessary). Press NEXT RECORD to scroll to the next case in the range and PREVIOUS RECORD to scroll back to the previous case.

- If you make updates in a case and attempt to scroll to another case in the range without committing, the System asks if you want to save data before moving on.

- If actions are locked in a case, the office code and initials of the person who locked them are displayed on the Comprehensive page (page 3) for the one **920** action code (**ACTION RECORDS LOCKED**) in the case. Only one **920** action can exist in a case. When actions are unlocked, this action record is automatically deleted from the case.

- The B/C field's default for each case type/action code combination is set by your BLM State Office. Pressing NEXT FIELD with a **C** in the B/C field moves the cursor to page 3. Pressing NEXT FIELD with a **B** in the B/C field moves the cursor to the next record on page 2 only if no values in the current record have been changed. If you alter data in any field of the current record, this form forces you to page 3 so that employee initials can be entered.

- For all existing actions, you may use NEXT/PREVIOUS BLOCK at any time (regardless of the letter in the B/C field) to move quickly between pages 2 and 3 within the current record.

- Cursor movement and field access on page 3 are determined by the case type and action code of the current record. The Money Amount field is not accessible on this form, and simply displays financial data for the current action, if present.
- Pressing DELETE RECORD and entering Y in the Do you really want to delete this record? field immediately deletes an action from a case.
- Action numbers are not generated on this form when records are created. Action numbers are generated for new actions only when COMMIT is pressed to save updates for the current case.
- Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of **70**. This code indicates that more than one second date type is acceptable for this case type/action code combination.
- In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.
- If you exit the form before committing action updates in the current case, the data is not saved. The System does not ask you if you want to commit your work before exiting.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise C-2** (Update Action, Update Action - Brief and Update Action - Range of Serial Numbers).*

Update Action/Land Relationship Form (CASE101F)

45 minutes
(including Exercise C-3)

Review the purpose of the Update Action/Land Relationship form.

Purpose and use of the Update Action/Land Relationship Form:

This form allows you to establish or delete relationships between an action record and case land record(s) in an existing case. Only specific actions that pertain to lands in a case can be linked to case lands.

Action/land relationships are important in the Interim System because the associations serve to automatically establish case land status and to allow you to reserve U.S. rights when lands are patented, leased or otherwise affected by an action.

Use this form to link a specific action to specific land(s) within a case.

Review who uses this form and why.

BLM personnel responsible for creating a link between case actions and case land records and setting case land status for lands within a case use this form to perform their task.

Review the important role action/land ties play in the Interim System.

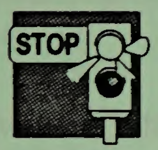
NOTE:
Associating action records with case land records is new. It is the only way in the Interim System to establish case land status. Only specific actions that pertain to lands in a case can be linked to case lands; when one of these actions is related to a case land, the land's status is set automatically. Thus, when you create an action/land relationship, you also indirectly set case land status.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE101F program name in QXFER:

The Update Action/Land Relationship form (CASE101F) is an option on the Update Action/Land Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu, and finally the Update Action/Land option from the Update Action/Land Menu. This form can also be accessed from any menu in the In-

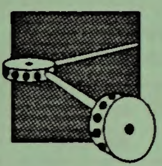
terim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE101F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

- Case Serial Number.
- A valid Action Number (for an action in the case pertaining to case lands).
- A valid Case Land Number (or range of Case Land Numbers) for the selected Case.



Review this form's basic structure and the types of data that can be entered, changed and deleted.

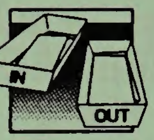
Structure of form:

The Update Action/Land Relationship Form consists of a single page containing fields specifically related to a single case serial number, a single action record in the case, all case land records in the case, and fields for entering a range of case land numbers. The form is divided into four distinct sections, each containing a set of fields.

- Case Serial Number fields (Geo State, Land Office, etc...).
- Land Number Range fields.
- Fields for a single action record in the case (Action Number, Action Date, Action Code/Description and Parcel data).
- Fields for all case land records in the case (Land Number, Land Status, Meridian, Township, Range, Section, Aliquot Part, Survey Type and Number, Tract, Block, Lot and Case Land Acres).

Emphasize that most of the data on this form is displayed so that users can choose the correct actions and land(s) to link.

Much of the information that appears on this form is displayed so that you may choose which action and land(s) to associate. You only enter information into a select number of fields for making these associations, and you cannot alter any of the displayed action or case land record information on this form.



Work flow within this form to **create** an action/land relationship and a review of the form's fields:

Note:
*There are two workflows for this form – one to **create** and one to **delete** action/land ties.*

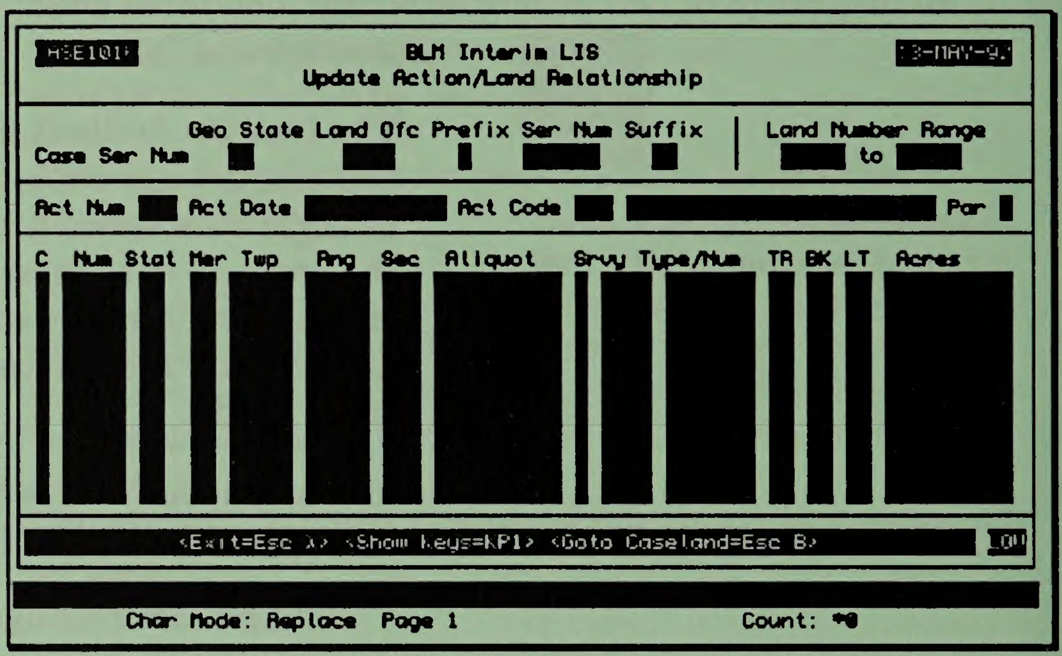
*Review and demonstrate the step-by-step workflow to **create** action/land ties.*

Use the available training aids as needed (particularly the Action/Land relationship wall display).

Mention the importance of NEXT/PREVIOUS BLOCK in using this form.

NOTE:

Using the NEXT BLOCK and PREVIOUS BLOCK function keys is integral for navigating among the various sections of this form.



STEP 1

Enter a valid case serial number in the block of fields at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Only cases containing at least one action record that is (or can be) linked to lands are acceptable.

Demonstrate and discuss LOV where available.

Explain why only cases containing at least one land action can be entered.

Review the information displayed on the form for the specified case and explain what C *in the first field of the case land block indicates.*

The cursor moves to the Action Number field in the action record block. Information concerning the latest action record, by action number, that is (or can be) related to case land records appears in this block. Information for all land records appears in the case land records block in the lower portion of the form. The first field of the case land records block is either blank or contains the letter C. C indicates that the case land record on that line is already related to the action record displayed in the action record block. A blank in this field indicates that no action/land relationship has been established between this case land record and the displayed action record.

STEP 2

Thoroughly review the use of the action record block. Emphasize that only land actions in the specified case are displayed on this form one at a time.

You cannot enter information into the fields of the action record block. Choose the action record you want to associate with case land records by pressing NEXT/PREVIOUS RECORD to scroll through the action records displayed in the action record block's fields.

Only certain actions pertaining to lands in the case can be related to case lands, and only these action records appear as you scroll through actions. Actions that cannot be related to case lands do not appear on this form.

Discuss and demonstrate entering and executing a query (including the use of the optional wildcard character) to retrieve specific record(s) from the case.

You may enter and execute queries, based on parameters entered in the action record block, to retrieve a specific record(s) from the case; this is useful when you know the action number of the record you want to link to lands and do not want to scroll through the full list of retrieved actions. Use the query wildcard character, %, as needed. The System retrieves all action records in the current case that meet your query criteria and can be linked to lands.

Emphasize that the one action record displayed can be linked to case lands in the case.

Once the appropriate action record is displayed, you can link it to a range of land records in the case simultaneously, or link it to individual land records one at a time.

Emphasize that the most recent action, by action date, linked to a land description sets land status.

NOTE:
The most recent action, by action date, associated with a case land record determines land status, regardless of the order in which action/land relationships are made.

STEP 3

To link the displayed action to a range of case land records, press NEXT FIELD in the Action Number field and move to the first Land Number Range field in the upper right-hand corner of the form.

Thoroughly review the procedure to link the current action to a range of case lands.

Enter the lowest and highest land numbers that specify the range of case land records in the two Land Number Range fields, and press COMMIT to establish a set of action/land relationships. If you want to link the displayed action record to all case land records in the case, enter the word ALL in the first Land Number Range field, and press NEXT FIELD. The full range of

land numbers in the case appears. Press COMMIT to link the displayed action to all the case's case land records.

Describe what happens when previously linked lands fall within the specified range.

NOTE:

You can enter a range of land numbers that includes lands previously linked to the displayed action. If this is done, new action/land relationships are created for only those lands in the range not already linked to the action. Previously existing associations are not effected.

Once the range of action/land associations is made, the land status of the linked land records is updated automatically. In addition, **C** appears in the first field of the case land record block beside land records within the range. **C** indicates that an action/land relationship exists between a land record and the displayed action record.

Use NEXT BLOCK if you want to move to the case land record block, and use PREVIOUS FIELD if you want to move back to the action record block.

STEP 4

Thoroughly review the procedure to link the current action to individual case lands.

To link the displayed action record to individual case land records, press NEXT BLOCK in the Action Number field and move to the first field on the first line of the case land record block. Each line of this block contains data for one case land record. The first field of each record contains the letter **C** if the land record is related to the displayed action record, or is blank if no link exists between the two records.

Only the first field of each case land record is accessible. Use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll through the list of land records.

Discuss and demonstrate entering and executing a query to display a subset of case lands in the case.

You may enter and execute queries, based on parameters entered in the case land record fields, to selectively display a subset of the land records in the case.

To create a single action/land relationship, move the cursor to the land record you want to link to the displayed action. Enter **C** in first field of this record, and press COMMIT or NEXT FIELD. After you acknowledge the message that appears on the message

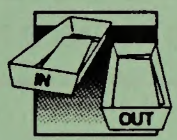
line, the land status of the linked land record updates automatically, and C appears in the first field of the land record to indicate that an action/land relationship exists between this land record and the displayed action.

Discuss how action/land links can be created for both ranges and individual lands during the same session.

NOTE:

You may relate the displayed action record to land records by range and/or one at a time within the same session on this form, but you must press COMMIT before moving from one method of creating relationships to the other.

or...



Work flow within this form to **delete** an existing action/land relationship record:

Review and demonstrate the step-by step workflow to ***delete*** *action/land ties.*

Emphasize that the last (or only) action/land tie for a land cannot be deleted and that an action/ land tie cannot be deleted if U.S. Rights have been reserved on the land with the action.

NOTE:

All lands previously related to action(s) within a case must remain tied to at lease one action. Thus, you cannot delete an action/land relationship if it is the last (or only) relationship that exists for the case land.

You cannot delete an action/land relationship if U.S. rights have been reserved on the case land with the related action. To delete such action/ land ties, you must first delete the U.S. rights linked to these action/land associations using the Update U.S. Rights Form (CASE105F).

STEP 1

As in the work flow for creating action/land relationships, enter a valid case serial number in the block of fields at the top of the page. Similarly, select the appropriate action record in the action record block that your deletions concern.

Review the initial workflow similarities between deleting and creating action/land ties.

You may enter and execute queries, based on parameters entered in the action record block, to retrieve a specific record(s) from the case.

Once the appropriate action record is displayed, you can delete its association to a range of land records in the case simultaneously, or delete its link to individual land records one at a time.

STEP 2

Thoroughly review the procedure to delete the action/land ties between the current action and a range of case lands.

Explain why a range of ties cannot be deleted if the range includes a land having only one action/land tie (i.e., a tie to the selected action). Also explain why a range of ties cannot be deleted if the range includes a land for which U.S. Rights have been reserved.

To delete the link between the displayed action record and a range of lands in the case, move to the first Land Number Range field.

NOTE:
You cannot delete a range of action/land relationships if the range includes a land record having only one action/land relationship – and that relationship is with the displayed action. Additionally, you may not delete a range of action/land relationships if the range includes a land for which U.S. rights have been reserved.

Mention that COMMIT does not need to be pressed to delete a range of ties, just DELETE RECORD.

Enter the lowest and highest land numbers that specify the range of land records in the Land Number Range fields, and press DELETE RECORD to delete the action/land relationships. You may enter the word **ALL** in the first Land number Range field to specify all lands in the case; press DELETE RECORD to delete the ties between the displayed action and all the case's case lands.

When an action/land link is deleted, the land status of the affected land updates automatically, and the **C** in the first field of the case land record block disappears. The absence of **C** beside a land record indicates that no link exists between the land and the displayed action.

Describe what happens when unlinked lands fall within the specified range.

NOTE:
You can enter a range of land numbers that includes lands not linked to the displayed action. If this is done, action/land relationships are deleted for only those lands in the range linked to the action.

STEP 3

Thoroughly review the procedure to delete the link between the current action and individual case lands.

Review entering and executing a query to display a subset of case lands.

Emphasize that users can press DELETE RECORD or they can enter D *and press COMMIT.*

To delete the link between the displayed action and individual land records, press NEXT BLOCK in the Action Number field and move to the case land record block. C in the first field of this block indicates a land record tied to the displayed action.

You may enter and execute queries, based on parameters entered in the case land record fields, to selectively display a subset of the land records in the case.

To delete a single action/land relationship, move the cursor to the appropriate land record and either press DELETE RECORD or enter D (over the existing C) in the record's first field and press COMMIT. After you acknowledge the message that appears on the message line, the land status of the affected land record updates automatically, and the C in the first field of the case land record block disappears. The absence of C beside a land record indicates that no link exists between the land record and the displayed action.

Discuss how action/land links can be deleted for both ranges and individual lands during the same session.

NOTE:

You may delete relationships between the displayed action record and land records by range and/or one at a time within the same session on this form, but you must press COMMIT or DELETE RECORD (whichever is appropriate) before moving from one method of deleting relationships to the other.

Review the Quirks subsection point by point and briefly summarize the use of the Update Action/Land Relationship form.

Quirks and special data issues for CASE101F:

- Associating action records with case land records is new. It is the only way in the Interim System to establish case land status. Only specific actions that pertain to lands in a case can be linked to case lands; when one of these actions is related to a case land, the land's status is set automatically. Thus, when you create an action/land relationship, you also indirectly set case land status.
- Using the NEXT BLOCK and PREVIOUS BLOCK function keys is integral for navigating among the various sections of this form.

- You cannot alter action or case land records information on this form. Action and case land data are displayed to help you correctly choose the action and case land records to link.

- Only certain actions pertaining to lands in the case can be related to case lands, and only these action records appear as you scroll through actions. Actions that cannot be related to case lands do not appear on this form.

- The most recent action, by action date, associated with a case land record determines land status, regardless of the order in which action/land relationships are made.

- You can create action/land relationships by associating an action record with a range of case land records and/or associating an action record with individual case land records. You can create action/land ties both ways within the same session on this form.

- All lands previously related to action(s) within a case must remain tied to at lease one action. Thus, you cannot delete an action/land relationship if it is the last (or only) relationship that exists for the case land.

- You cannot delete an action/land relationship if U.S. rights have been reserved on the case land with the related action. To delete such action/land ties, you must first delete the U.S. rights linked to these action/land associations.

- You can delete the relationship between an action record and a range of case land records and/or an individual case land record. You can delete action/land ties both ways within the same session on this form.

- Use COMMIT when creating a range of action/land relationships; use DELETE RECORD when deleting a range of action/land relationships.

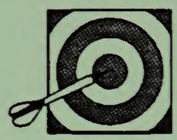
- Use the word ALL in the first Land Number Range field to quickly specify all lands in a case when creating or deleting links between the displayed action record and all land records in the case.

- Enter C or D in the first field of the case land record block, and use COMMIT when creating or deleting individual action/land relationships.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise C-3** (Update Action/Land Relationships).*

Update MMS Finance Transfer Transactions Form (CASE164F)



15 minutes

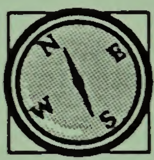
Review the purpose of the Update MMS Finance Transfer Transactions form.

Review who uses this form and why.

Purpose and use of the Update MMS Finance Transfer Transactions Form:

This form allows you to add, change and delete financial (money) transfer transactions concerning monies received by MMS for a single case in the BLM automated land and mineral record system.

BLM personnel responsible for updating MMS finance transfer transactions in individual cases in the Interim System use this form to perform their tasks.



Review navigation to this form (including QXFER).

Navigation to this form and use of CASE164F program name in QXFER:

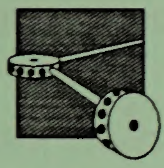
The Update MMS Finance Transfer Transactions Form (CASE164F) is an option on the Update Action/Land Menu within the Case Processing chapter. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu and finally the Update MMS Finance Transfer Transactions option from the Update Action/Land Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE164F program name.

Discuss data required to use this form and the minimum data needed to add an action to a case.

Required Data you must have to use this form:

- Employee Initials (Alaska only).
- Case Serial Number.
- Information for an update (addition, change or deletion) you wish to make in any MMS finance transfer transactions in the case.

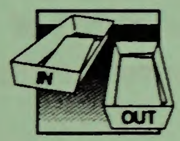
NOTE:
When adding a new action in the action block of this form, an action date, action code and money amount are required.



Review this form's basic structure and the types of data that can be entered, changed and deleted.

Structure of the form:

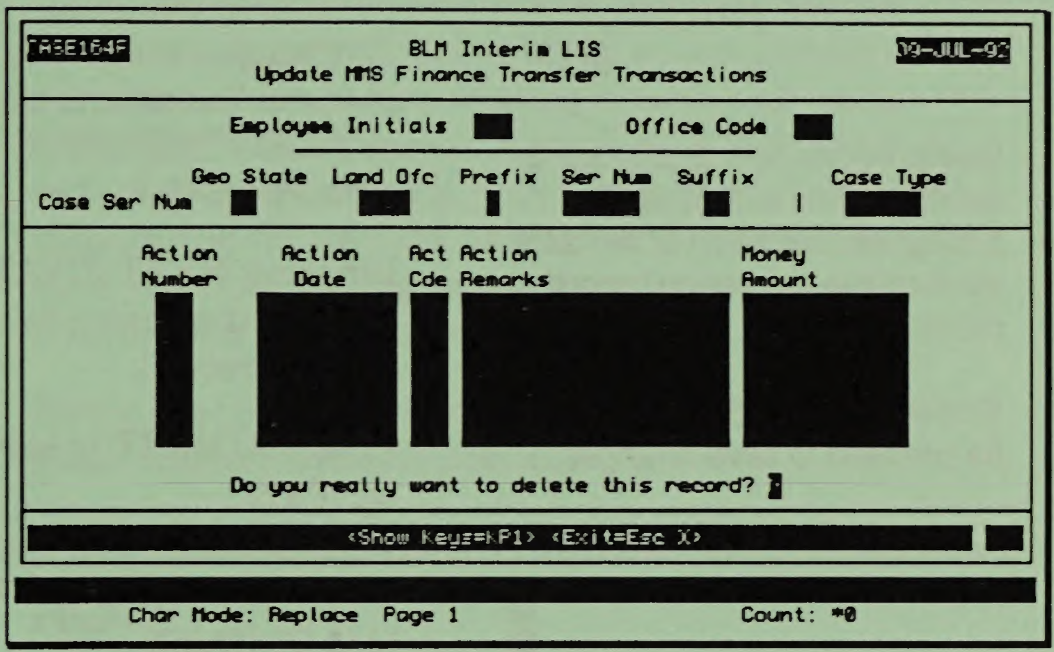
The Update MMS Finance Transfer Transactions Form consists of a single page containing fields that allow you to specify your employee initials, office code, and a single case serial number, as well as action record fields that allow you to update money actions specifically related to MMS finance transfer transactions.



Review and demonstrate the step-by-step workflow for the Update MMS Finance Transfer Transactions form.

Use the available training aids as needed.

Work flow within this form and a review of the form's pages and fields:



STEP 1

Explain that all actions updated on this form receive the initials and office code entered at the top of the form.

Each MMS finance transfer action updated for the specified case during one session on this form receives the same employee initials and, if entered, office code. Enter your initials and office code, or the initials and office code of the employee authorizing MMS finance transfer transaction update(s), in the fields at the top of the form.

Emphasize that employee initials are required in Alaska.

Employee initials are required in Alaska.

Demonstrate and discuss LOV where available.

Enter a valid, case serial number in the appropriate fields. Use the Lists of Values (LOV) available in the Geographic State and Land office fields, in necessary. Serial numbers of voided cases are not accepted.

Emphasize that only cases accepting MMS money actions are used on this form.

NOTE:

Only certain case types allow MMS finance transfer actions, and only serial numbers of cases having these case types are accepted on this form.

Emphasize that only MMS transfer money actions are retrieved and displayed on this form.

The System retrieves the case type of the specified case and displays it to the right of the case serial number. The System also retrieves all existing MMS finance transfer (money) actions in the case and displays up to six of them in the action record block.

STEP 2

Demonstrate how to change an existing MMS money action. Briefly discuss each of the data elements in the action record block.

Emphasize that COMMIT must be pressed to save changes,

To change an existing MMS finance action record, move to the record using NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET, and add, change or delete data as needed.

Pressing NEXT FIELD in the Money Amount field returns the cursor to the Action Date field of the current record.

Press COMMIT to save your changes before exiting the form.

!

Warn students that locked actions can be altered on this form.

WARNING:

This form allows you to change information in MMS finance transfer transaction records that have been locked using the Lock Action Records Form (CASE106F), and no warning or error message is displayed.

STEP 3

Demonstrate the process of deleting an existing action record.

Emphasize that COMMIT must be pressed after DELETE RECORD.

To delete an existing MMS finance action record, move to the record using NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET, and press DELETE RECORD. The cursor moves to the Do you really want to delete this record? field. Enter **Y** and press NEXT FIELD to remove the record from the form. Although the record disappears, it is not truly deleted from the database until you press COMMIT. Enter **N** and press NEXT FIELD to cancel the deletion.

Press COMMIT to delete the actions removed on this form from the case before exiting.

Emphasize that locked actions cannot be deleted.

!

WARNING:

You cannot delete locked MMS finance transfer transaction records.

STEP 4

To add a new MMS finance action record, press CREATE RECORD. The System generates a new blank record, and the cursor moves to the Action Date field on the new line. NEXT RECORD can also be used to create a new record when the cursor is in the last action on the form.

Demonstrate and discuss the process of adding new MMS money actions to a case.

Demonstrate and discuss using CREATE RECORD and DUPLICATE record to save reentering identical values over and over again.

If you are adding an action that has field values similar to those of another MMS action displayed on this form, move to the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can add, change and delete data as needed. This procedure can save you from having to reenter identical action information over and over again.

Enter the required action date and action code for the MMS finance transfer action.

Emphasize that only five action codes are allowed on this form and that no LOV is available in the Action Code field. Remind students that the five action codes are case type sensitive.

NOTE:

Only five action codes can be entered on this form (**059**, **060**, **061**, **094** and **095**). These are listed on the message line when you access the Action Code field, and no List of Values (LOV) is available.

The case type of the current case determines which of the five available action codes can be entered.

Mention that some case type/action code combinations require structured remarks.

Enter remarks for this MMS finance transfer transaction, if appropriate.

Mention that the decimal and cents do not have to be entered if the money amount is a whole dollar number.

Enter the amount of money received or refunded by MMS to be reflected by this finance transfer action record. If the amount is a whole number, you do not need to enter the decimal point and cents.

Mention that NEXT FIELD loops you back to the Action Date in the current record.

Press NEXT FIELD to return to the Action Date field of the current record.

Warn students that COMMIT must be pressed before EXIT to save additions and updates.

Press COMMIT to save your additions and generate new action numbers in the case before exiting this form.

WARNING:
The System does not ask if you want to save your updates before exiting.

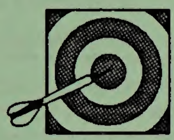
Review the Quirks subsection point by point and briefly summarize the use of the Update MMS Finance Transfer Transactions form.

Quirks and special data issues for CASE164F:

- Each MMS finance transfer action updated for the specified case during one session on this form receives the same employee initials and, if entered, office code.
- Only certain case types allow MMS finance transfer actions, and only serial numbers of cases having these case types are accepted on this form.
- This form allows you to change information in MMS finance transfer transaction records that have been locked using the Lock Action Records Form (CASE106F), and no warning or error message is displayed.
- After pressing DELETE RECORD and entering `Y` in the Do you really want to delete this record? field, you must press COMMIT to truly delete an action record from a case.
- You cannot delete locked MMS finance transfer transaction records.
- Only five action codes can be entered on this form (`059`, `060`, `061`, `094` and `095`). These are listed on the message line when you access the Action Code field, and no List of Values (LOV) is available. The case type of the current case determines which of the five available action codes can be entered.
- The System does not ask if you want to save your updates before exiting. Press COMMIT to save updates before pressing EXIT.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Add MMS Finance Transfer Transactions Form (CASE165F)



15 minutes

Review the purpose of the Add MMS Finance Transfer Transactions form, emphasizing the restriction.

Review who uses this form and why.

Purpose and use of the Add MMS Finance Transfer Transactions Form:

This form allows you to add financial (money) transfer transactions concerning monies received by MMS for one or more random cases in the BLM automated land and mineral record system.

BLM personnel responsible for adding MMS finance transfer transactions to one or more random cases in the Interim System use this form to perform their tasks.

Review navigation to this form (including QXFER).

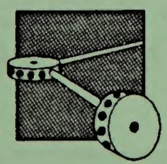
Navigation to this form and use of CASE165F program name in QXFER:

The Add MMS Finance Transfer Transactions Form (CASE165F) is an option on the Update Action/Land Menu within the Case Processing chapter. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Update Action/Land Menu option from the Case Processing Menu and finally the Add MMS Finance Transfer Transactions option from the Update Action/Land Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE165F program name.

Discuss data required to use this form and the minimum data needed to add an action to a case.

Required Data you must have to use this form:

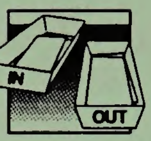
- Employee Initials (Alaska only).
- Case Serial Number.
- Action Date and Action Code.
- Money Amount.



Review this form's basic structure and the types of data that can be entered.

Structure of the form:

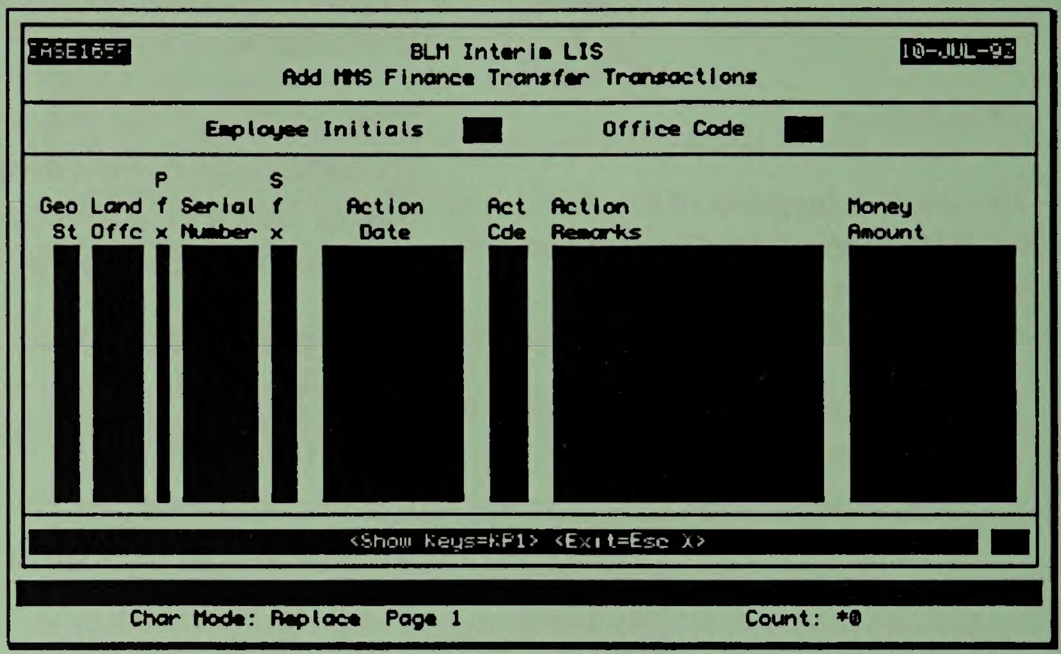
The Add MMS Finance Transfer Transactions Form consists of a single page containing fields that allow you to specify employee initials and office code, as well as individual random case serial numbers and the MMS finance transfer actions to be added to each.



Work flow within this form and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the Add MMS Finance Transfer Transactions form.

Use the available training aids as needed.



STEP 1

Emphasize that all actions added on this form receive the initials and office code entered at the top of this form.

Each MMS finance transfer action added to a specified case during one session on this form receives the same employee initials and, if entered, office code. Enter your initials and office code, or the initials and office code of the employee authorizing the addition of MMS finance transfer transaction(s), in the fields at the top of the form.

Employee initials are required in Alaska.

Emphasize that employee initials are required in Alaska.

Demonstrate and discuss LOV where available.

Emphasize that only cases accepting MMS money actions are accepted on this form.

Enter a valid case serial number to which an MMS finance action is to be added. Use the Lists of Values (LOV) available in the Geographic State and Land office fields, in necessary. Serial numbers of voided cases are not accepted.

NOTE:

Only certain case types allow MMS finance transfer actions, and only serial numbers of cases having these case types are accepted on this form.

STEP 2

Enter the required action date and code for the MMS finance transfer action to be added to the case specified in this record.

Emphasize that only five action codes are allowed on this form and that no LOV is available in the Action Code field. Remind students that the five action codes are case type sensitive.

Only five action codes can be entered on this form (059, 060, 061, 094 and 095). These are listed on the message line when you access the Action Code field, and no List of Values (LOV) is available.

The case type of the specified case determines which of the five available action codes can be entered.

Demonstrate and discuss using CREATE RECORD and DUPLICATE RECORD to save reentering the same data over and over again.

NOTE:
If you are adding an additional MMS money action to the same case or an action record that has field values similar to those of the last record entered on this form, move to the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can add, change and delete data as needed. This procedure can save you from having to reenter identical action information over and over again.

Mention that some case type/ action code combinations require structured remarks.

Enter remarks for this MMS finance transfer transaction, if appropriate.

Mention that the decimal and cents do not have to be entered if the money amount is a whole dollar number.

Enter the amount of money received or refunded by MMS to be reflected in the specified case by this finance action record. If the amount is a whole number, you do not need to enter the decimal point and cents.

STEP 3

Review and demonstrate how to add additional records, scroll through records and remove uncommitted records.

If you want to move to the next record and enter another MMS finance transfer action, press NEXT FIELD or NEXT RECORD. You may scroll through the list of records entered using NEXT/PREVIOUS RECORD, and remove records from the form (before pressing COMMIT) using CLEAR RECORD or DELETE RECORD.

Demonstrate and discuss what happens when COMMIT is pressed.

Press COMMIT to add the action information entered on this form to the specified case(s) in the database. The action record block clears, and the cursor moves to the first record's Action Date field.

Warn students that COMMIT must be pressed before exiting the form to save additions.

WARNING:

The System does not ask if you want to save your additions before exiting. Press COMMIT to save your data before pressing EXIT.

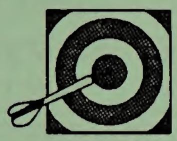
Review the Quirks subsection point by point and briefly summarize the use of the Add MMS Finance Transfer Transactions form.

Quirks and special data issues for CASE165F:

- Each MMS finance transfer action added to a specified case during one session on this form receives the same employee initials and, if entered, office code.
- Only certain case types allow MMS finance transfer actions, and only serial numbers of cases having these case types are accepted on this form.
- Only five action codes can be entered on this form (`059`, `060`, `061`, `094` and `095`). These are listed on the message line when you access the Action Code field, and no List of Values (LOV) is available.
- The System does not ask if you want to save your additions before exiting. Press COMMIT to save your data before pressing EXIT.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Update General Remarks Form (CASE103F)



10 minutes

Review the purpose of the Update General Remarks form.

Review who uses this form and why.

Purpose and use of the Update General Remarks Form:

This form allows you to add, change and delete General Remarks records within an established case.

BLM personnel responsible for updating general remarks information for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

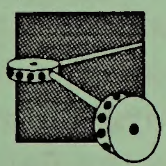
Navigation to this form and use of CASE103F program name in QXFER:

The Update General Remarks Form (CASE103F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Case Remarks option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE103F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Case Serial Number.
- Information for an update (addition, change or deletion) you wish to make in any general remarks records for the case.



Review this form's structure and the types of data that can be entered, retrieved and updated.

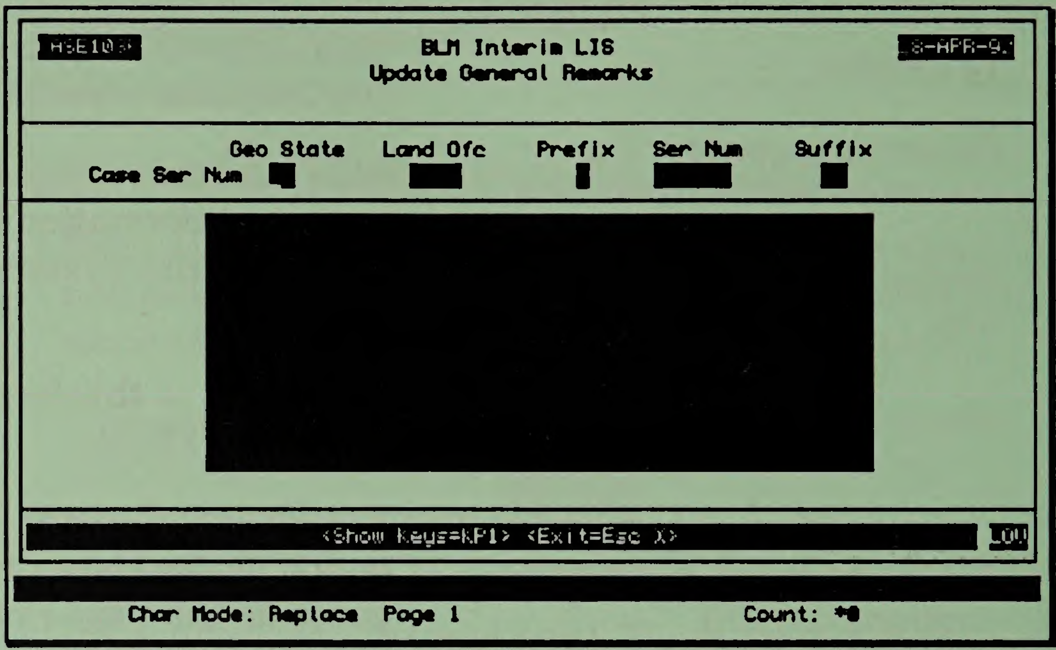
Structure of the form:

The Update General Remarks Form consists of a single page containing a large space in which general remarks records are displayed, allowing interactive updates (add, change and delete).

Work flow within this form and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the Update General Remarks form.

Use the available training aids as needed.



STEP 1

Enter a valid case serial number at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Mention that general remarks cannot be added to voided cases, but can be added to closed cases.

NOTE:

This form does not accept invalid serial numbers or the serial numbers of voided cases. Serial numbers of closed cases are accepted.

All existing general remarks, if any, for the current case appear on the various lines of the large General Remarks field, and the cursor moves to the first character of the first record in the field. If there are no existing records, the cursor appears on the first line for you to enter the first general remarks record.

There is no limit to the number of lines of general remarks data that can exist in the General Remarks field. As many lines as you need can be added to the bottom of the list of records or inserted where appropriate. If you add more than ten lines of remarks, the records displayed at the top of the field scroll off the screen to accommodate the additional records that scroll onto the bottom of the field.

Emphasize that all remarks remain in the order displayed on the form. Also mention that there is no word wrap between line of remarks.

NOTE:
All remarks remain in the order displayed on the form. If you insert a line, all subsequent lines are moved down.

Press NEXT FIELD at the end of each line to continue to the next line. This field does not have a wrap-around feature.

STEP 2

To scroll through any existing records, press NEXT/PREVIOUS RECORD or NEXT/PREVIOUS SET.

To update an existing record, move the cursor to the appropriate line and insert, replace or delete the necessary text. Use INSERT/REPLACE, if necessary, to switch between insert mode and replace mode.

Enter all new general remarks on a blank line.

To create a new record below the last existing record, move to the last remark's line and press NEXT RECORD or CREATE RECORD.

To insert a new record between two existing remarks, move to the line above where you want the new record inserted. Press CREATE RECORD; a blank line appears below the record you were on, and the cursor moves onto the blank line.

Describe how to create a new first record when there is an existing first record.

To create a new first record when an existing record occupies this line, move to the first line of remarks and press CREATE RECORD. When the cursor moves down onto the newly created blank line, press DUPLICATE RECORD to copy the existing first record onto the second line. Press PREVIOUS RECORD to move the cursor up to the first record, and type over the old text in replace mode, creating a new first record.

To delete an existing record, place your cursor on the appropriate record and press DELETE RECORD. The System removes the record from the field, but you must press COMMIT to truly delete it from the database.

Emphasize that additions, changes and deletions can be made in the same session, but COMMIT must be pressed to save updates before exiting the form.

Note:

You may add, change and delete general remarks records within the same session, but you must COMMIT all these updates to save your data before exiting the form.

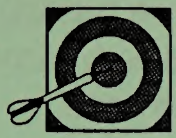
Review the Quirks subsection point by point and briefly summarize the Update General Remarks form.

Quirks and special data issues for CASE103F:

- This form does not accept invalid serial numbers or the serial numbers of voided cases. Serial numbers of closed cases are accepted.
- The large General Remarks field displays multiple lines, and each line of the field is an individual general remarks record.
- There is no word-wrap from one line to the next. To move from line to line, use the appropriate function keys.
- You are not limited to the ten visible lines of general remarks. As many lines as you need can be added to the bottom of the list of records or inserted where appropriate. If you add more than ten records to the list, the information displayed at the top of the field scrolls off the screen. To scroll up and down the list of general remarks records, use the appropriate function keys.
- To create a new first record when an existing record occupies this line, move to the first line of remarks and CREATE RECORD. With the cursor on the newly created blank line, DUPLICATE RECORD to copy the existing first record onto the second line. Move up to the first record, and type over the old text in replace mode.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Update Units/Commodity Form (CASE104F)



20 minutes

Review the purpose of the Update Units/Commodity form using examples provided in this section of the Training Guide.

Purpose and use of the Update Units/Commodity Form:

This form allows you to add, change or delete units and/or commodity data associated with an action record in an established case. Three common uses of the form allow you to:

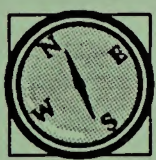
- Record the type of commodity authorized by an action for removal through a lease, permit or claim (e.g., a lease issued authorizing coal removal from BLM lands), as well as the quantity, units of measure and appraised value of the commodity (e.g., 9500 tons @ $200.00 per ton).

- Record the type of commodity actually removed through a lease, permit or claim (e.g., a member of the public removes sand and gravel from a community pit on BLM lands), as well as the quantity, units of measure and money amount paid for the commodity (e.g., 250 cubic yards valued at $112.50).

- Record the attributes (i.e., the units of measure and quantities) associated with a right-of-way across BLM land authorized by an action in a case (e.g., 150 feet in width, 2.35 miles in length).

Review who uses this form and why.

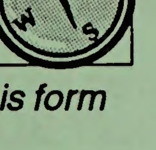
BLM personnel responsible for updating units/commodity information for existing land or mineral cases in the Interim System use this form to perform their task.



Review navigation to this form (including QXFER).

Navigation to this form and use of CASE104F program name in QXFER:

The Update Units/Commodity Form (CASE104F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Units/Commodity option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE104F program name.



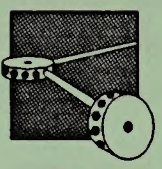
Discuss data required to use this form.

Required Data you must have to use this form:

- Case Serial Number.

• A valid Action Number within the specified case.

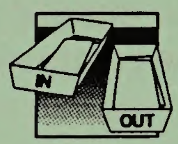
• Information for an update (addition, change or deletion) you wish to make in any units and/or commodities data for the case.



Review this form's structure and the types of data that can be entered, retrieved and updated.

Structure of form:

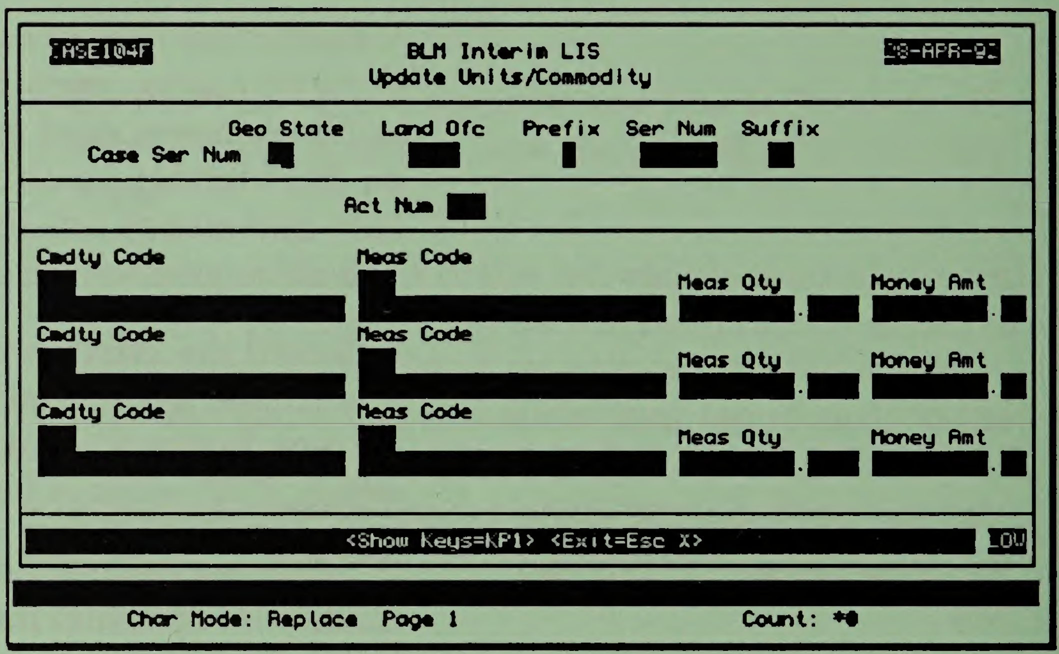
The Update Units Commodity Form consists of a single page containing fields specifically related to a case serial number, an action record in the case, and units and/or commodities information associated with the action.



Review and demonstrate the step-by-step workflow for the Update Units/Commodity form.

Use the available training aids as needed.

Work flow within this form and a review of fields:



STEP 1

Enter a valid case serial number at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

STEP 2

Enter a valid action number for the specified case, and press NEXT FIELD or NEXT BLOCK. Units/commodity records entered on this form are associated with individual actions in a case, and the action number you enter identifies the action.

Emphasize that units/commodity records are associated with individual actions in a case.

All existing units/commodity records for the specified action within the case are retrieved and displayed in the lower block of the form. If there are no existing records, the cursor moves to the Commodity Code field of the first record.

Discuss and demonstrate using LOV to retrieve an action number.

If you do not know the appropriate action number, use the List of Values (LOV) to access a list of all the case's actions, including action numbers, action codes and action code descriptions. Choose the appropriate action on the LOV and return its number to the Action Number field. The cursor moves to the first units/commodity record.

Describe using EXECUTE QUERY in the blank Action Number field to retrieve all actions in the case (one is displayed at a time) and review how to scroll through the case's actions.

Emphasize that you must COMMIT the updates for one action's units/commodity data before scrolling to another action.

NOTE:

You may press EXECUTE QUERY in the blank Action Number field to retrieve all action numbers (and any units/commodity records associated with them) in the case; while all actions are retrieved, data can be displayed for only one action at a time on the form. Initially, any existing units/commodity records associated with the first action number in the case are displayed, and the cursor moves to the first units/commodity record. To view the next action number in the case and its units/commodity data, return to the Action Number field and press NEXT RECORD. Although the cursor moves to the Geo State field in the case serial number, you may continue to press NEXT/PREVIOUS RECORD to scroll through the case's action numbers. As each action number is displayed on the form, any existing units/commodity records associated with that action are also displayed. To move the cursor to the units/commodity records for any action, use NEXT BLOCK or NEXT FIELD. Once you update one action's units/commodity records, press COMMIT; once data have been saved, you may return to the Action Number field and continue to scroll through the case's other action numbers and their units/commodity data.

Three units/commodity records are displayed in the units/commodity block for updating. Use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll through the existing records associated with the specified action. There is no limit to the number of units/commodity records you can associate with an action. If you add more than three records, those

displayed at the top of the block scroll off the form to accommodate additional records that scroll onto the bottom.

Warn students that the System neither compares nor validates any unit, commodity or measurement data entered. Users are completely responsible for entering appropriate data.

WARNING

The System neither compares nor validates the relationships between case type/action code combinations and commodity codes entered on this form. In addition, the System neither compares nor validates the relationships between commodity codes and measurement codes entered. Follow BLM standards when entering these data.

STEP 3

To create a units/commodity record, press CREATE RECORD or use NEXT RECORD if the cursor is in the last units/commodity record.

Discuss the meaning and use of each element in a units/commodity record.

Enter the commodity code, if appropriate, that identifies the type of commodity to be associated with the action.

Enter the measurement code, if appropriate, that identifies the unit of measure associated with the action (e.g., gallons, tons, linear feet, cubic yards, length in miles, pipeline diameter, etc...). If a commodity code was entered, the measurement code identifies the unit measure of the commodity.

Enter the measurement quantity, if appropriate, that identifies the number of units of measure associated with the action. In order to enter a measurement quantity, you must first enter a measurement code. If a commodity code was entered, the measurement quantity identifies the number of units of measure of the commodity.

Enter the money amount, if appropriate, for monies paid or received for the commodity, or the appraisal value per unit of measure for the commodity.

Emphasize that COMMIT must be pressed to save unit/commodity data for the current action before exiting the form or moving to another action.

You must COMMIT new units/commodity records for the current action number before exiting the form or retrieving another action's units/commodity data.

STEP 4

To update an existing units/commodity record, move to that record and add, change or delete data as needed. You must COMMIT your changes before exiting the form or retrieving another action's units/commodity data.

STEP 5

Emphasize that COMMIT must be pressed to save both changes and deletions.

To delete a units/commodity record, press DELETE RECORD. While the record is removed from the form, you must press COMMIT to truly delete it from the database.

Review the Quirks subsection point by point and briefly summarize the Update Units / Commodity form.

Quirks and special data issues for CASE104F:

- Units/commodity records entered on this form are associated with individual actions in a case, and you specify an action on this form by entering its action number. Action numbers are not action codes; they are simply numbers the System assigns to a case's actions to identify relationships between action records and, in this instance, units/commodity records.

- You update units/commodity records associated with one action in the specified case at a time.

- If you do not know an appropriate action number, use the List of Values (LOV) to access a list of all the case's actions.

- You may press EXECUTE QUERY in the blank Action Number field to retrieve all of the actions in a case and their associated units/commodity data; you may then scroll through the case's actions one at a time, and update their units/commodity records as needed.

- Three records of data are displayed in the units/ commodity block. There is no limit to the number of units/commodity records you can associate with an action. If you add more than three records, those displayed at the top of the block scroll off the form to accommodate additional records that scroll onto the bottom.

- The System neither compares nor validates the relationships between case type/action code combinations and commodity codes entered on this form. In addition, the System neither compares nor vali-

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

dates the relationships between commodity codes and measurement codes entered. Follow BLM standards when entering these data.

- You must COMMIT any additions, updates and deletions you make to units/commodity records for an action before moving on to any other action, even if the actions are in the same case.

Update U.S. Rights Form (CASE105F)

30 minutes

Review the purpose of the Update U.S. Rights form, emphasizing the necessity for an action/land relationship to exist before U.S. Rights can be reserved on a case land.

Purpose and use of the Update U.S. Rights Form:

This form allows you to add, change or delete U.S. rights reserved on case lands because of a certain action in a case (e.g., land is patented to a customer). In the Interim System, U.S. rights can be reserved only on case lands that are related to specific actions that make the reservation of U.S. rights necessary; an action/land relationship created with the Update Action/Land Relationship Form must be established before using the Update U.S. Rights Form. For each action record/land record combination within a case, the federal government may reserve any number of rights.

Use this form to record the reservation of certain rights by the United States in a land transaction, to change or delete a previously entered reservation, or to add or delete U.S. rights data linked to the relationships between one action record and a range of land records in a case.

Review who uses this form and why.

BLM personnel responsible for updating U.S. rights in title information for existing land or mineral cases in the Interim System use this form to perform their task.

Review the requirements for action/land relationships prior to using this form.

WARNING:

You cannot use this form unless an action/land relationship exists within a case. U.S. rights in title can be reserved on a case land only if it is already linked to an action necessitating the reservation of U.S. rights. Use the Update Action/Land Relationship Form (CASE101F) to create action/land relationships.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE105F program name in QXFER:

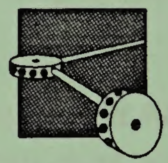
The Update U.S. Rights Form (CASE105F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update U.S. Rights option from the Case Processing Menu. This

form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE105F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Case Serial Number.
- An existing action in the specified case previously related (using CASE101F) to case land(s) in the case.
- Additions, changes or deletions of U.S. Rights Code(s) (i.e., reservations) for the case land(s) related to the specific action.



Review this form's structure and the types of data that can be entered, retrieved and updated.

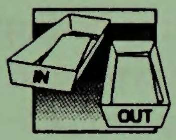
Structure of the form:

The Update U.S. Rights Form consists of a single page containing fields specifically related to a case serial number, an action record within that case previously related to case land records, all the case land records associated with that action, a range of case land numbers, and U.S. rights information. The form is divided into five distinct sections, each containing a set of fields.

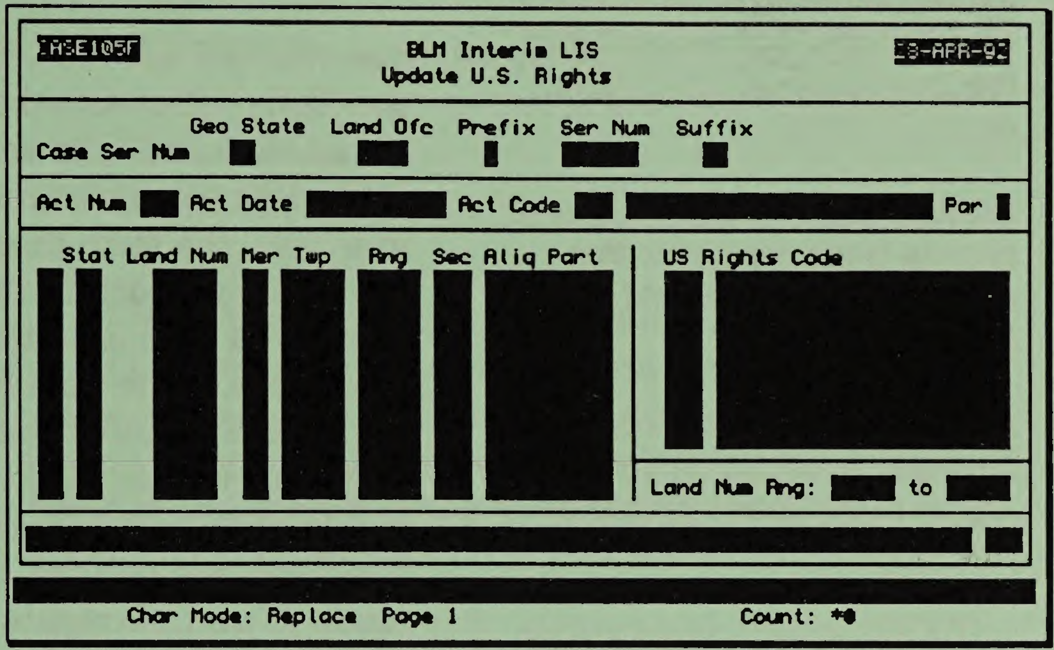
- Case Serial Number fields (Geo State, Land Office, etc...).
- Action Number, Action Date, Action Code/Description, Parcel code.
- Case land record data (Land Status, Land Number, Meridian, Township, Range, Section, Aliquot Part) for case land records linked to the selected action record.
- U.S. rights in title codes and descriptions.
- Land Number Range (From # - To #).

Emphasize that much of the data on this form is displayed so that users can choose the correct action (necessitating the reservation of U.S. Rights) and land(s) on which to reserve rights.

Much of the information that appears on this form is displayed so that you may choose the correct land record(s) in the case (already related to an action necessitating the reservation of U.S. rights) to which U.S. rights data are linked. You only enter information into a select number of fields to update U.S. rights information, and you cannot alter any of the displayed action or case land record data.



Work flow within this form to update U.S. rights reservations for **individual** case lands and a review of form's fields:



Note:
There are two workflows for this form – one to update U.S. rights for ***individual*** *case lands and one to update rights for a* ***range*** *of case lands.*

Review and demonstrate the step-by-step workflow for the Update U.S. Rights form.

Use the available training aids as needed.

WARNING:

U.S. rights reserved on a case land are cumulative throughout the history of a case. If multiple actions in a case have each necessitated the reservation of U.S. rights on a case land, the rights reserved resulting from each action accumulate for that land in the case. If the rights reserved by the United States on a case land change, you may need to update the rights reserved on that land through each older action in the case that necessitated a reservation.

Warn students that U.S. Rights reserved on a land are cumulative throughout the history of a case – a land may have multiple reservations resulting from multiple actions in a case.

STEP 1

Enter a valid case serial number for a case containing action/land relationship(s) at the top of the form, and move to the Action Number field in the action record block. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Information for the latest action record (by action number) related to land records appears in the action record block, and information for all case land records linked to this action appears in the case land block.

Demonstrate and discuss LOV where available.

Explain why only cases containing action/land relationship(s) can be entered.

Review the information displayed on the form for the specified case.

STEP 2

Thoroughly review the use of the action record block to select an action that has necessitated the reservation of U.S. Rights on case land(s).

Mention that only actions related to case lands appear on this form and that action data cannot be updated.

Explain how the current case land is indicated and how a user knows which action/land relationship is current on the form.

The action record block simply displays actions in the case, one at a time, that have been previously related to case lands. Actions in the case not related to case lands do not appear on this form. You cannot alter any action data on this form.

Use NEXT/PREVIOUS RECORD to scroll through the available action numbers, and choose the action record in the case that has necessitated the reservation of U.S. rights on case land(s). As you scroll to each action in a case, the form displays case land records linked to that action record in the case land block. The lowest numbered case land tied to the action appears in the top record of the case land block with an arrow pointing to it in its left-most field; this case land is considered the current land record on this form. If U.S. rights exist for the current case land (necessitated by the displayed action), they appear in the U.S. rights block. If no U.S. rights are linked to the current land due to the displayed action, a message to this effect appears in the message line.

Remind students that U.S. Rights are reserved on a case land by way of an existing action/land relationship.

NOTE:

You cannot reserve rights on a case land until it is related to an appropriate action. All U.S. rights are thus reserved by way of an existing action/land relationship. Use the Update Action/Land Relationship Form (CASE101F) to establish the action/land relationships within a case prior to using this form to reserve U.S. rights.

When the action record that has necessitated the reservation of U.S. rights on land(s) in the case is displayed, press NEXT FIELD or NEXT BLOCK and move to the case land block.

STEP 3

Thoroughly review the use of the case land block to select a land on which to reserve U.S. Rights.

Discuss how only lands linked to the current action are displayed.

Each line of the case land block contains data for a land record related to the displayed action record in the case.

The first field of each record in this block provides space for the arrow symbol, which indicates the current case land record on the form. Rights reserved for the United States on the current case land (resulting from the displayed action) are displayed in the U.S. rights block.

Press NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll through the case land records. Each time you move the arrow, you change the current case land, and the data displayed in the U.S. rights block changes to list rights reserved on the current land.

Mention that existing U.S. Rights for the current action/ land relationship are displayed in the U.S. Rights block. Describe how U.S. rights data can change as you scroll through lands in the case land block.

Move to the case land record on which you want to update U.S. rights data, and press NEXT FIELD or NEXT BLOCK to move to the U.S. rights block for the current case land.

STEP 4

You can add, change or delete U.S. rights records (resulting from the displayed action) for the current case land record in the U.S. rights block. U.S. rights records displayed in this block contain a U.S. rights code that you enter, as well as a description of the code automatically filled in by the System.

Review and demonstrate how to add, change and delete U.S. Rights for an individual record – an individual action/land relationship.

To add a U.S. rights record for the current land, move to a blank line in the U.S. rights block (press NEXT RECORD or CREATE RECORD), and enter the code for the U.S. right you want to reserve on the current case land. Use the List of Values (LOV), if necessary.

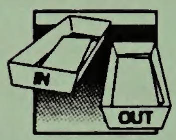
To change an existing U.S. rights code for the current land, simply replace the code; use the List of Values (LOV), if necessary.

To delete an existing U.S. rights record for the current land, move to that record and press DELETE RECORD.

When working in the U.S. rights block for an individual land record, you can add, change and delete U.S. rights codes during the same session. Before exiting the form or leaving the U.S. rights block to select another case land or action in the case, remember to COMMIT the additions, changes and deletions you have made.

Emphasize that U.S. Rights data can be added, changed and deleted for an individual land during the same session, but COMMIT must be pressed before exiting the form or selecting another land record.

or...



*Review and demonstrate the step-by-step workflow to update U.S. Rights for a **range** of case lands.*

Emphasize that U.S. Rights cannot be changed for a range of case lands – only added or deleted. Also emphasize that, when rights are deleted from a range, all rights reserved by way of the current action on the range of lands are deleted.

Work flow within this form to add or delete U.S. rights reservations for a **range** of case lands in a case:

NOTE:

This form only allows you to add or delete U.S. rights codes (necessitated by the displayed action) simultaneously for a range of case lands. You may not change a U.S. rights code simultaneously for a range of case lands. Changes to U.S. rights codes must be done for individual case lands (see the previous work flow).

When you delete U.S. rights (associated with the displayed action) simultaneously from a range of case lands, you delete all of the U.S. rights on those lands reserved through the displayed action. You cannot delete some codes and leave others.

STEP 1

Review the initial workflow similarities between updating rights for an individual land and a range of case lands.

As in the work flow for updating U.S. reservations for individual case lands, enter a valid case serial number at the top of the form. Similarly, you must select the appropriate case action record in the action record block that has necessitated the addition (or deletion) of U.S. rights reservations on the range of lands within the case.

STEP 2

Thoroughly review the procedure to add U.S. rights to a range of lands.

Explain that it is simplest to first select the lowest numbered land in the range, move to the U.S. Rights block, and then enter the right to be added.

To add (i.e., reserve) U.S. rights necessitated by the displayed action on a range of case lands, press NEXT BLOCK or NEXT FIELD and move to the case land block. Select the lowest numbered land record in the range to which you want to reserve U.S. rights, and press NEXT BLOCK or NEXT FIELD to move to the U.S. rights block.

Warn students that all displayed rights for the selected land are added to the range of lands, even previously existing rights; thus, carefully select the current land to ensure that proper rights are added to the range.

WARNING:

All U.S. rights displayed for the current land record will be reserved, not only on the current land, but also on all case lands within the range you enter. If the case land you selected already has U.S. rights reserved on it that you do not want reserved on the other lands within the range, select a different case land that has either no U.S. reservations or only U.S. rights you do want reserved on the other lands within the range.

Move to a blank record, if necessary, using NEXT RECORD or CREATE RECORD, and enter the code for a U.S. right you want reserved on all case lands within in the range. Use the List of Values (LOV), if necessary. Enter as many U.S. rights codes as needed in this block. Remember that all codes listed in the U.S. rights block will be reserved on the current case land and all lands within the range.

Explain how to use the land number range block. Emphasize that COMMIT must be pressed twice, once to add the displayed rights to the current case land, and once to add the rights to the range of lands.

Press NEXT BLOCK or NEXT FIELD and move to the first field in the land number range block. Enter the lowest and highest land numbers that identify land records within the range, and press COMMIT. The System first adds the displayed U.S. rights to the current case land and the following message appears:

```
Transaction completed -- X records pro-
cessed.
Press any function key to acknowledge
message.
```

When you press any function key, the following message appears:

```
Press Commit key again if adding Rights to
multiple lands.
```

Press COMMIT a second time to add the displayed U.S. rights codes to the rest of the case lands within the specified range.

Mention the use of the word **ALL** *in the land number range block.*

If you want to reserve U.S. rights displayed in the U.S. rights block on all lands linked to this action, enter the word **ALL** in the first field of the land number range block, and press NEXT FIELD. The full

range of land numbers linked to the action appears in this block; press COMMIT (see above) to reserve the currently displayed U.S. rights on all these lands.

STEP 3

To delete all U.S. rights reserved on a range of lands within a case, use NEXT BLOCK or NEXT FIELD and move to the first field in the land number range block.

!

WARNING:

Deleting U.S. rights within a range of lands associated with the displayed action may include U.S. rights not displayed in the U.S. rights block for the current land number.

Thoroughly review the procedure to delete U.S. Rights from a range of lands.

Warn students that deleting rights from a range deletes all rights reserved on these lands by way of the current action, even rights not displayed for the currently selected individual land.

Emphasize that only DELETE RECORD needs to be depressed to delete U.S. Rights from a range of lands.

Enter the lowest and highest land numbers that identify land records within the range, and press DELETE RECORD. The following warning appears on the message line:

```
WARNING: This will delete all U.S. Rights
for this Land Number range.
Press any function key to acknowledge
message.
```

Press any function key to acknowledge the message, then press DELETE RECORD a second time to delete all U.S. rights reservations on the case lands within the range.

If you want to delete the U.S. rights (associated with the displayed action) for all lands linked to this action, enter the word `ALL` in the first field of the land number range block, and press NEXT FIELD. The full range of land numbers linked to the action appears in this block; press DELETE RECORD (see above) to delete the U.S. rights associated with the displayed action on these lands.

Review the Quirks subsection point by point and briefly summarize the Update U.S. Rights form.

Quirks and special data issues for CASE105F:

- In the Interim System, U.S. rights can be reserved only on case lands that are related to specific actions that make the reservation of U.S. rights necessary; an action/land relationship created with the Update Action/Land Relationship Form must be established before using the Update U.S. Rights Form.

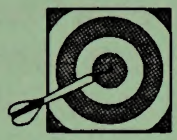
- This form is divided into five distinct sections, each containing different information: case serial number, action data, case land data, U.S. rights data and land number range.
- Much of the information that appears on this form is displayed only so you may choose the correct action record and land record(s) in the case to which U.S. rights data are linked. You cannot alter any of the displayed action or case land record data.
- U.S. rights reserved on a case land are cumulative throughout the history of a case. If multiple actions in a case have each necessitated the reservation of U.S. rights on a case land, the rights reserved resulting from each action accumulate for that land in the case.
- The action record block simply displays actions in the case, one at a time, previously related to case lands. Actions not related to case lands do not appear on this form.
- The first field of each case land record provides space for the arrow symbol, which indicates the current case land on the form. Each time you move the arrow, you change the current case land, and data in the U.S. rights block changes to list rights reserved on the current land.
- For individual case lands, you may add, change and delete U.S. rights (necessitated by the displayed action) on this form.
- When updating U.S. rights data for individual case lands, you must commit any additions, changes or deletions before moving on to another case land, even if both are in the same case.
- For a range of case lands, this form allows you to only add or delete U.S. rights codes (necessitated by the displayed action). You may not change a U.S. rights code simultaneously for a range of case lands. Changes to U.S. rights codes must be done for individual case lands.
- When you add U.S. rights to a range of case lands, all U.S. rights displayed for the current land record will be reserved, not only on the current land, but also on all case lands within the range. Carefully

select the current case land when adding rights to a range to avoid adding unwanted U.S. rights previously reserved on the current case land to the entire range.

- When committing U.S. rights added to a range of case lands, the System first adds the displayed U.S. rights to the current case land. Follow directions in the message line, and press COMMIT a second time to add the displayed U.S. rights codes to the rest of the case lands within the specified range.
- When you delete U.S. rights simultaneously from a range of case lands, you delete all of the U.S. rights on those lands reserved by way of the displayed action. You cannot delete some codes and leave others. Furthermore, deleting U.S. rights within a range of lands associated with the displayed action may include U.S. rights not displayed in the U.S. rights block for the current land number.
- When deleting U.S. rights from a range of case lands associated with the displayed action, the System first deletes U.S. rights from the current case land. Follow directions in the message line, and press DELETE RECORD a second time to delete U.S. rights from the rest of the case lands within the specified range.
- Use the word **ALL** in the first field of the land number range block when adding or deleting U.S. rights (necessitated by the displayed action) to/from all the case lands linked to the action.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Update Geographic Name Form (CASE102F)



45 minutes
(including Exercise C-4)

Review the purpose of the Update Geographic Name form.

Review who uses this form and why.

Purpose and use of the Update Geographic Name Form:

This form allows you to add, change or delete geographic or site names on established cases within the System. There is no limit to the number of geographic names that can be associated with a case.

BLM personnel responsible for updating geographic name information for existing land or mineral cases in the Interim System use this form to perform their task.

Emphasize that mining claims are not geographic names but that mineral patent claim names can be entered as geographic names.

NOTE:

Do not use the Update Geographic Name Form for mining claim names on mining claim cases. Use the Case Header Record Form (CASE110F), Claim Name field to edit mining claim names. The exception exists for claim names associated with mineral patent cases which can be added to the patented case using this form.

Review navigation to this form (including QXFER).

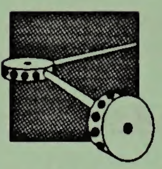
Navigation to this form and use of CASE102F program name in QXFER:

The Update Geographic Name Form (CASE102F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Geographic Name option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE102F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

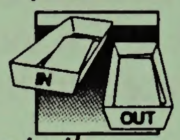
- Case Serial Number.
- Information for an update (addition, change or deletion) you wish to make in any geographic name records for the case.



Review this form's structure and the types of data that can be entered, retrieved and updated.

Structure of the form:

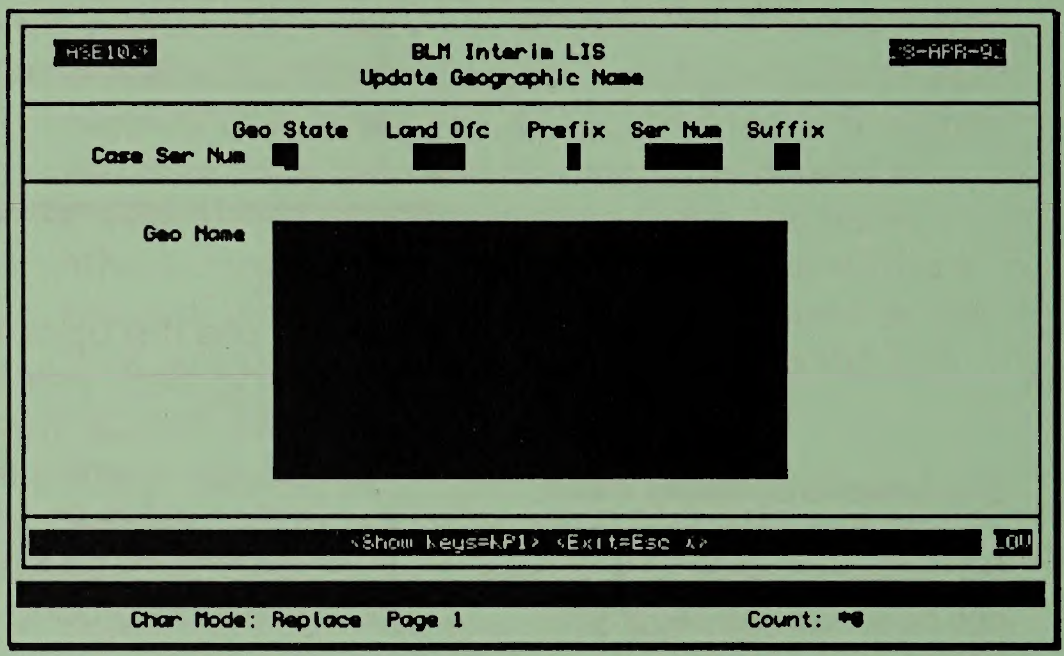
The Update Geographic Name Form consists of a single page containing a large space in which geographic name records are displayed, allowing interactive updates (add, change and delete).



Review and demonstrate the step-by-step workflow for the Update Geographic Name form.

Use the available training aids as needed.

Work flow within this form and a review of the form's pages and fields:



STEP 1

Enter a valid case serial number at the top of the form. Use the List of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Emphasize that geographic names are always retrieved and displayed in alphabetical order.

All existing geographic name information for the current case appears in the large Geographic Name field. If the case already has associated geographic names, they will be listed automatically in alphabetic order. Your cursor appears in the left-most space of the first line of the Geographic Name field.

STEP 2

Use NEXT/PREVIOUS RECORD, NEXT/PREVIOUS SET, CREATE RECORD, DELETE RECORD, and INSERT/REPLACE to add, change or delete geographic names.

Emphasize that there is no word wrap.

When entering geographic name data, limit each entry to one line (40 characters) because the System stores and retrieves each record in alphabetical order. If text extends beyond one line, the resulting two lines may not appear in order when alphabetized.

Emphasize that additions, changes and deletions can be made in the same session but COMMIT must be pressed to save updates before exiting.

Remember to COMMIT additions, changes, and deletions before exiting the form. If you exit without committing, all updates from this session are lost.

You may not commit a geographic name that has already been saved for the case.

WARNING:

When you attempt to COMMIT, particularly after making changes to several records, the following message may appear if you have attempted (unsuccessfully) to insert characters into a record already containing 40 characters:

Emphasize that duplicate geographic names cannot be added to a case and that error messages may appear if the System thinks you are trying to COMMIT such a name.

```
ERROR: This Geo Name is already on
file for this serial number.
```

Review how to use CREATE RECORD, DUPLICATE RECORD and DELETE RECORD to resolve error conditions.

Although no actual changes were made to the record in question, the System believes a change was made. The System also recognizes that this is the same as the record already saved in the database. Consequently, the System does not want to save a duplicate record.

The same error occurs when you make a change to a record and change the record back to its original condition prior to committing.

To resolve this problem, move the cursor to the record causing the error, and press CREATE RECORD. In the new record, press DUPLICATE RECORD. The record above appears in the record just created. Move the cursor back to the first record and delete the record causing the error. You may now COMMIT without losing any changes.

Quirks and special data issues for CASE102F:

Review the Quirks subsection point by point and briefly summarize the Update Geographic Name form.

- The Geographic Name field displays multiple lines, and each line of the field is an individual geographic name record.
- All geographic name records are retrieved and displayed in alphabetic order regardless of the order in which they are entered.

- There is no word-wrap from one line to the next.
- You are not limited to the ten visible geographic name records. As many lines as necessary can be added to the bottom of the list of lines or inserted in the middle. If you add more than ten lines to the list, the information displayed at the top of the field scrolls off the screen. To scroll up and down the list of geographic name records, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise C-4 *(Update General Remarks, Update Units/Commodity, Update U.S. Rights and Update Geographic Name).*

Lock/Unlock Action/Land Records Menu

5 minutes

Discuss navigation to the Lock/ Unlock Action/Land Records Menu from the Case Processing Menu.

Review the general purpose of each menu option.

Refer to the Case Processing portion of the System Map.

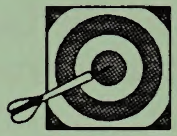
Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions.

Through the Lock/Unlock Action/Land Records Menu you may access forms that allow you to lock and unlock all action records as of a particular date, and to lock and unlock all land records within a specified case. There are four forms available on the Lock/ Unlock Action/Land Records Menu used to lock and unlock records:

Note:
The Case Processing Menu option returns you to the menu one level higher in the system from which you can access other options in Case Processing.

Lock Action Records Form (CASE106F)



20 minutes

Review the purpose of the Lock Action Records form.

Purpose and use of the Lock Action Records Form:

This form allows you to lock the action records for one or more cases, where the case action date falls on the same day or before the action date noted to lock the records. When you use this form, existing action records in the specified cases may not be deleted or changed until you unlock the action records using the Unlock Action Records Form (CASE108F). However, you may continue to add action codes to the cases with a date later than the lock date.

Use the Lock Action Records Form (CASE106F) when you wish restrict/prevent updates to action records in one or more cases.

Review who uses this form and why.

BLM personnel responsible for locking action records for existing land or mineral cases in the Interim System use this form to perform their task.

Mention that actions in voided cases cannot be locked.

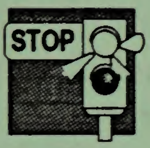
Emphasize that only one lock action record can exist in a case at a time and discuss the process for locking actions using a different date.

NOTE:
You may not lock actions in voided cases. You may also not lock actions in cases where actions are already locked; to lock actions in such a case using a different lock date, you must first use the Unlock Action Records Form (CASE108F) and then return to CASE106F to lock action records with the new date.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE106F program name in QXFER:

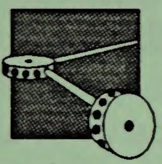
The Lock Action Records Form (CASE106F) is an option on the Lock/Unlock Action/Land Records Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Lock/Unlock Action/Land Records Menu option from the Case Processing Menu, and finally the Lock Action Records option from the Lock/Unlock Action/ Land Records Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE106F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

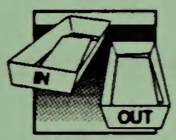
- One or more Case Serial Numbers and/or Ranges of Case Serial Numbers.
- Lock Date for each Case Serial Number and Range of Case Serial Numbers.
- Employee Initials and Office Code.
- Action Lock Word.



Review this form's structure and the types of data that can be entered.

Structure of form:

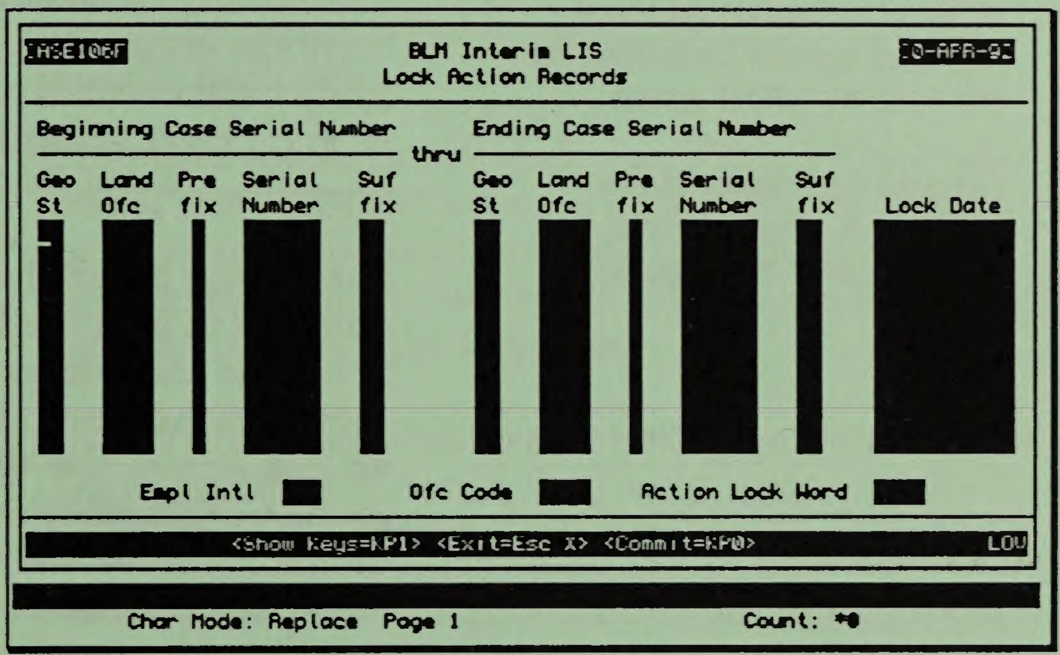
The Lock Action Records Form consists of a single page containing fields specifically related to locking action records in one or more established cases in the Interim System.



Review and demonstrate the step-by-step workflow for the Lock Action Records form.

Use the available training aids as needed.

Work flow within this form and a review of the form's pages and fields:



ASE106F BLM Interim LIS 0-APR-9

Lock Action Records

Beginning Case Serial Number thru Ending Case Serial Number

Geo St | Land Ofc | Pre fix | Serial Number | Suf fix | Geo St | Land Ofc | Pre fix | Serial Number | Suf fix | Lock Date

Empl Intl Ofc Code Action Lock Word

<Show Keys=KP1> <Exit=Esc X> <Commit=KP0> LOU

Char Mode: Replace Page 1 Count: *0

Emphasize that only nine lines of serial numbers and lock dates may be entered.

This form contains lines that allow you to enter up to nine single (or random) case serial numbers and/or ranges of serial numbers. You may enter both individual serial numbers and ranges (using different lines for each) on this form. For each individual serial number or range entered, you must also enter an action lock date.

Each line in the serial number/lock date section allows you to enter a single serial number, a random serial number or a range of serial numbers. If you are enter-

Discuss and demonstrate entering a single/random serial number and lock date.

Demonstrate and discuss LOV where available.

ing multiple random serial numbers and/or ranges of numbers on this form, use as many as nine lines to enter these values and/or ranges.

For single (or random) serial numbers, enter a valid case serial number in the Beginning Case Serial Number fields. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Since you are not entering a range of serial numbers, press NEXT FIELD and skip to the Lock Date field when the cursor moves to the Ending Case Serial Number's Geographic State field. Enter the date from which you wish to lock the action records for the case. All action records with an action date on or before this date will be locked to changes and deletions. Be sure the lock date is not earlier than the case's earliest action and no later than today's date.

Emphasize that lock dates entered for individual serial numbers cannot be earlier than the case's earliest action.

NOTE:
The System verifies that individual case serial numbers entered on this form are valid. The System also verifies that a lock date is not earlier than a case's earliest action.

Discuss and demonstrate entering a range of serial numbers and a lock date.

For a range of serial numbers, enter valid case serial numbers in both the Beginning Case Serial Number fields and the Ending Case Serial Number fields that specify the sequential set of cases for which you want actions locked. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Enter the date from which you wish to lock the action records for the range of cases. All action records with an action date on or before this date will be locked to changes and deletions. Be sure that the lock date is not earlier than the earliest action in the range of cases and no later than today's date.

Discuss how the land office codes for beginning and ending serial numbers must be the same and that ending numbers must be larger than beginning numbers.

Discuss how the System verifies that the lock date is not earlier than the earliest action in the beginning case, but does not check actions in the other cases in the range.

NOTE:

When you enter beginning and ending serial numbers for a range, the System verifies that the land office codes of both numbers are the same, and verifies that the ending number is larger than the beginning number. Although the System verifies that the lock date entered for a range is no earlier than the dates of any actions in the beginning case serial number, action dates in the other cases in the range are not checked.

When you finish entering individual case serial numbers and/or ranges of serial numbers, as well as the appropriate lock dates, press NEXT FIELD in the blank first Geographic State field of a line and move to the Employee Initials field.

STEP 2

Employee initials and office code are required. Enter your initials and office code, or the initials and office code of the person who authorized locking actions in the specified cases.

Emphasize that employee initials and office code are required.

Thoroughly discuss the importance of lock action words.

Enter the required action lock word. This is the confidential four-character set used by the System to lock the existing action records on or before the date(s) specified in the Lock Date fields. All cases specified on this form use the same lock word.

!

WARNING:

The exact same word or character sequence must be used to unlock the records. Be sure to write down your action lock word for future reference in unlocking the actions associated with this case.

STEP 3

Press COMMIT in the Action Lock Word field to lock the actions, as of the specified lock date(s), in the individual case(s) and/or range(s) of cases.

Describe what happens in each specified case when COMMIT is pressed.

The System locks actions in one case at a time (even within ranges), beginning at the top of the list of serial numbers you entered on this form. A lock action record (`920 - ACTION RECORDS LOCKED`) is added to

Emphasize that **ACTION RECORDS LOCKED** *records can only be deleted using CASE108F.*

the actions in each processed case; this action can only be deleted using the Unlock Action Records Form (CASE108F).

Briefly review how to relock actions in a case using a different date.

Note:

A case may contain only one lock action record at a time. To relock actions in a case using a different lock date, you must first use the Unlock Action Records Form (CASE108F) and then return to CASE106F to lock action records with the new date.

Briefly review the error messages that can appear after COMMIT is pressed. Explain what happens when these messages are acknowledged.

If the System cannot lock the actions in a case, an error message appears. Invalid case serial numbers, voided cases, cases containing no actions dated as early as the lock date, and cases already containing locked actions will cause an error. If a serial number you entered is invalid, the following message appears:

ERROR: Invalid Serial Number.

If a case you specified has been voided, the following message appears:

This Case is Void: AKXX xxxxxx

If a case you specified contains no actions dated as early as the action lock date, the following message appears:

Lock Date Outside Action Date Range for Case Serial Number: AKXX xxxxxx

If actions in a case you specified are already locked, the following message appears:

This Case Serial Number was previously locked: AKXX xxxxxx

If an error occurs on an individual or random case serial number, or on the ending case serial number of a range, acknowledge the error message, and the System continues locking actions in the cases on your list. This also holds true if the error occurs for the ending case serial numbers entered for ranges.

If an error occurs on the beginning case serial number entered for a range, or on a serial number in the middle of a range, processing stops and subsequent cases are not locked. When you acknowledge the error message, the total number of cases for which actions have been locked appears. Actions in cases processed before the error occurred are locked, but you may need to reenter unlocked serial numbers and/or ranges on this form and recommit.

STEP 4

When the System has locked the actions in all specified cases, or when the processing of a range of cases listed on the form stops because of an error, the following message appears:

```
Total Number of Serial Numbers Locked: x
```

Review the Quirks subsection point by point and briefly summarize the Lock Action Records form.

Quirks and special data issues for CASE106F:

- The action lock date determines which action records are locked. All action records in the specified case(s) dated on or before the lock date cannot be altered or deleted once they are locked using this form. Actions can be unlocked only by using the Unlock Action Record Form (CASE108F).

- You may not lock actions in voided cases. You may also not lock actions in cases where actions are already locked; to lock actions in such a case using a different lock date, you must first use the Unlock Action Records Form (CASE108F) and then return to CASE106F to lock action records with the new date.

- This form contains lines that allow you to enter up to nine single (or random) case serial numbers and/or ranges of serial numbers. You may enter both individual serial numbers and ranges (using different lines for each) on this form. For each individual serial number or range entered, you must also enter an action lock date.

- The System verifies that individual case serial numbers entered on this form are valid.

- For individual serial numbers, the System verifies that a lock date is not earlier than a case's earliest action.

- When you enter beginning and ending serial numbers for a range, the System verifies that the land office codes of both numbers are the same, and verifies that the ending number is larger than the beginning number. Although the System verifies that the lock date entered for a range is no earlier than the dates of any actions in the beginning case serial number, action dates in the other cases in the range are not checked.

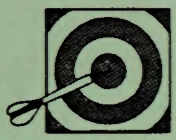
- The exact same word or character sequence must be used to unlock the records. Be sure to write down your action lock word for future reference in unlocking the actions associated with this case.

- When you press COMMIT in the Action Lock Word field, the System locks actions in one case at a time (even within ranges), beginning at the top of the list of serial numbers you entered on this form. A lock action record (`920 - ACTION RECORDS LOCKED`) is added to the actions in each processed case; this action can only be deleted using the Unlock Action Records Form (CASE108F).

- If the System cannot lock the actions in a case, an error message appears. Invalid case serial numbers, voided cases, cases containing no actions dated as early as the lock date, and cases already containing locked actions will cause an error. If an error occurs on an individual or random case serial number, or on the ending case serial number of a range, acknowledge the error message, and the System continues locking actions in the cases on your list. If an error occurs on the beginning case serial number entered for a range, or on a serial number in the middle of a range, processing stops and subsequent cases are not locked; you may need to reenter unlocked serial numbers and/or ranges on this form and recommit.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Lock Land Records Form (CASE107F)



15 minutes

Review the purpose of the Lock Land Records form.

Purpose and use of the Lock Land Records Form:

This form allows you to lock all the land records for one or more cases. When you use this form, no one may add new land records to the specified cases, and no one may delete or change any existing land records in these cases. To unlock land records, use the Unlock Land Records Form (CASE109F).

Use the Lock Land Records Form (CASE107F) when you wish restrict/prevent additions and updates to land records in one or more cases.

Review who uses this form and why.

BLM personnel responsible for locking land records for existing land or mineral cases in the Interim System use this form to perform their task.

Mention that lands cannot be locked in voided cases.

Emphasize that only one lock land record can exist in a case at a time.

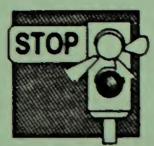
NOTE:

You may not lock lands in voided cases. You may also not lock lands in cases where lands are already locked.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE107F program name in QXFER:

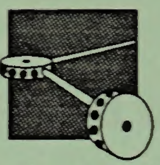
The Lock Land Records Form (CASE107F) is an option on the Lock/Unlock Action/Land Records Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Lock/Unlock Action/Land Records Menu option from the Case Processing Menu, and finally the Lock Land Records option from the Lock/Unlock Action/Land Records Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE107F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

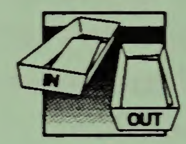
- One or more Case Serial Numbers and/or Ranges of Case Serial Numbers.
- Employee Initials and Office Code.
- Land Lock Word.



Review this form's structure and the types of data that can be entered.

Structure of the form:

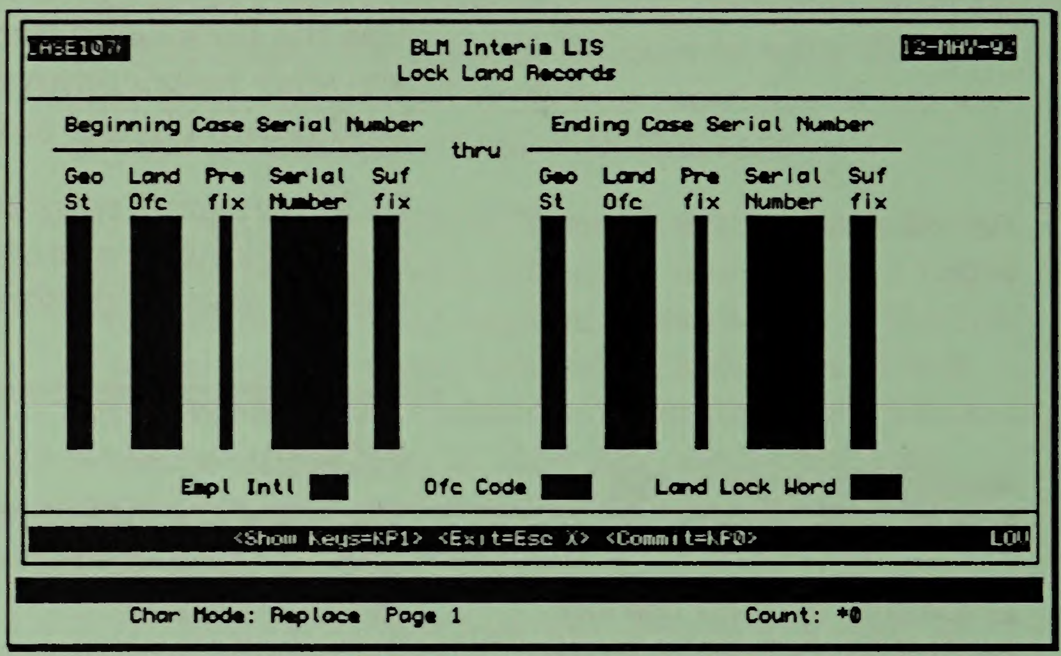
The Lock Land Records Form consists of a single page containing fields specifically related to locking land records in one or more established cases in the Interim System.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Lock Land Records form.

Use the available training aids as needed.



STEP 1

This form contains lines that allow you to enter up to nine single (or random) case serial numbers and/or ranges of serial numbers. You may enter both individual serial numbers and ranges (using different lines for each) on this form.

Emphasize that only nine lines of serial numbers may be entered.

Each line in the serial number section allows you to enter a single serial number, a random serial number or a range of serial numbers. If you are entering multiple random serial numbers and/or ranges of numbers on this form, use as many as nine lines to enter these values and/or ranges.

Discuss and demonstrate entering a single/random serial number.

Demonstrate and discuss LOV where available.

For single (or random) serial numbers, enter a valid case serial number in the Beginning Case Serial Number fields. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Since you are not entering a range of serial numbers, press NEXT FIELD and move to the next line when the cursor moves to the Ending Case Serial Number's Geographic State field.

Mention that serial numbers are not verified upon entry, although numbers larger than the last assigned serial number in the System are not accepted.

NOTE:

The System validates all geographic state and land office codes entered on this form. Although the System does not validate case serial numbers when they are entered, it does not allow you to enter a serial number outside of the range of existing numbers (i.e., a number larger than the last serial number assigned).

Discuss and demonstrate entering a range of serial numbers.

For a range of serial numbers, enter valid case serial numbers in both the Beginning Case Serial Number fields and the Ending Case Serial Number fields that specify the sequential set of cases for which you want lands locked. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Discuss how the land office codes for beginning and ending serial numbers must be the same and that ending numbers must be larger than beginning numbers.

NOTE:

When you enter beginning and ending serial numbers for a range, the System verifies that the land office codes of both numbers are the same, and verifies that the ending number is larger than the beginning number.

When you finish entering individual case serial numbers and/or ranges of serial numbers, press NEXT FIELD in the blank first Geographic State field of a line and move to the Employee Initials field.

STEP 2

Employee initials and office code are required. Enter your initials and office code, or the initials and office code of the person who authorized locking lands in the specified cases.

Emphasize that employee initials and office code are required.

Thoroughly discuss the importance of lock land words.

Enter the required land lock word. This is the confidential four-character set used by the System to lock the existing land records. All cases specified on this form use the same lock word.

!

WARNING:

The exact same word or character sequence must be used to unlock the records. Be sure to write down your land lock word for future reference in unlocking the lands associated with this case.

STEP 3

Press COMMIT in the Land Lock Word field to lock the lands in the individual case(s) and/or range(s) of cases.

Describe what happens in each specified case when COMMIT is pressed.

Emphasize that `LAND DESCRIPTION LOCKED` *records can only be deleted using CASE109F.*

Remind students that only one lock land record can exist in a case at a time.

Briefly review the error messages that can appear after COMMIT is pressed. Explain what happens when these messages are acknowledged.

The System locks lands in one case at a time (even within ranges), beginning at the top of the list of serial numbers you entered on this form. A lock land action record (`975 - LAND RECORDS LOCKED`) is added to each processed case; this action can only be deleted using the Unlock Land Records Form (CASE109F).

Note:

A case may contain only one lock land action record at a time.

If the System cannot lock the lands in a case, an error message appears. Invalid case serial numbers, voided cases, and cases already containing locked lands will cause an error. If a serial number you entered is invalid, the following message appears:

`ERROR: Invalid Serial Number.`

If a case you specified has been voided, the following message appears:

`This Case is Void: AKXX xxxxxx`

If lands in a case you specified are already locked, the following message appears:

```
This Case Serial Number was previously
locked: AKXX xxxxxx
```

If an error occurs on an individual or random case serial number, or on the ending case serial number of a range, acknowledge the error message, and the

System continues locking lands in the cases on your list. This also holds true if the error occurs for the ending case serial numbers entered for ranges.

If an error occurs on the beginning case serial number entered for a range, or on a serial number in the middle of a range, processing stops and subsequent cases are not locked. When you acknowledge the error message, the total number of cases for which lands have been locked appears. Lands in cases processed before the error occurred are locked, but you may need to reenter unlocked serial numbers and/or ranges on this form and recommit.

STEP 4

When the System has locked the lands in all specified cases, or when the processing of a range of cases listed on the form stops because of an error, the following message appears:

```
Total Number of Serial Numbers Locked: x
```

Review the Quirks subsection point by point and briefly summarize the Lock Land Records form.

Quirks and special data issues for CASE107F:

- Once you use this form, no one may add new land records to the specified cases, and no one may delete or change any existing land records in these cases. To unlock land records, use the Unlock Land Records Form (CASE109F).
- You may not lock lands in voided cases. You may also not lock lands in cases where lands are already locked.
- This form contains lines that allow you to enter up to nine single (or random) case serial numbers and/or ranges of serial numbers. You may enter both individual serial numbers and ranges (using different lines for each) on this form.
- The System validates all geographic state and land office codes entered on this form. Although the System does not validate case serial numbers when they are entered, it does not allow you to enter a serial number outside of the range of existing numbers (i.e., a number larger than the last serial number assigned).

- When you enter beginning and ending serial numbers for a range, the System verifies that the land office codes of both numbers are the same, and verifies that the ending number is larger than the beginning number.

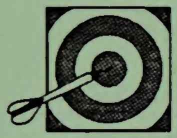
- The exact same word or character sequence must be used to unlock the records. Be sure to write down your land lock word for future reference in unlocking the lands associated with this case.

- When you press COMMIT in the Land Lock Word field, the System locks lands in one case at a time (even within ranges), beginning at the top of the list of serial numbers you entered on this form. A lock land action record (`975 - LAND RECORDS LOCKED`) is added to each processed case; this action can only be deleted using the Unlock Land Records Form (CASE109F).

- If the System cannot lock the lands in a case, an error message appears. Invalid case serial numbers, voided cases, and cases already containing locked lands will cause an error. If an error occurs on an individual or random case serial number, or on the ending case serial number of a range, acknowledge the error message, and the System continues locking lands in the cases on your list. If an error occurs on the beginning case serial number entered for a range, or on a serial number in the middle of a range, processing stops and subsequent cases are not locked; you may need to reenter unlocked serial numbers and/or ranges on this form and recommit.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Unlock Action Records Form (CASE108F)



10 minutes

Review the purpose of the Unlock Action Records form.

Purpose and use of the Unlock Action Records Form:

This form allows you to unlock action records in a previously established case. When you use this form, you release previously locked action records in the specified case for update, allowing deletion and editing through one of the update action forms.

Use the Unlock Action Records Form (CASE108F) to restore access to the action records for a specific case.

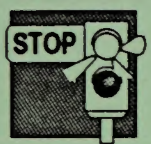
Review who uses this form and why.

BLM personnel responsible for unlocking and updating action records for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE108F program name in QXFER:

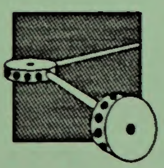
The Unlock Action Records Form (CASE108F) is an option on the Lock/Unlock Action/Land Records Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Lock/Unlock Action/Land Records Menu option from the Case Processing Menu, and finally the Unlock Action Records option from the Lock/Unlock Action/ Land Records Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE108F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

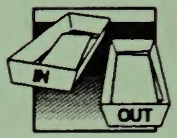
- Case Serial Number.
- Action Lock Word.



Review this form's structure and the types of data that can be entered, retrieved.

Structure of the form:

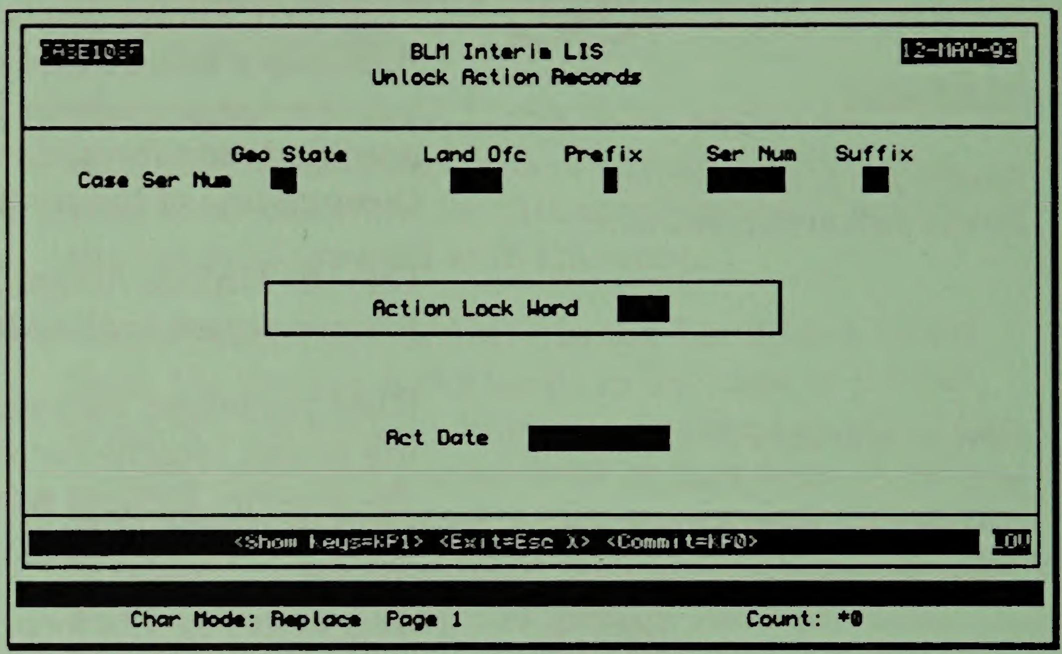
The Unlock Action Records Form consists of a single page containing fields specifically related to unlocking action records in an established case in the Interim System.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Unlock Action Records form.

Use the available training aids as needed.



STEP 1

Enter a valid case serial number for a case with locked action records at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Mention that only cases with locked actions are allowed.

If you enter an invalid serial number or the serial number of a case in which action records are not locked, an error message appears on the message line, and the cursor returns to the Geo State field.

If the case contains locked actions, the cursor moves to the Action Lock Word field.

STEP 2

Enter the action lock word that correctly identifies the confidential word previously used to lock the existing action records.

Review the importance of action lock words.

!

WARNING:

The same action lock word used to lock the action records is required to unlock them.

Mention that the date retrieved from the lock action record is simply for the user's information.

The System automatically retrieves the action date from the action used to lock the records and displays this date in the field at the bottom of the form. This identifies the date prior to which action records for this case are locked. The action date is displayed for your information, and you cannot alter it.

Press COMMIT to unlock the action records for this case. If you press EXIT without committing the unlock transaction, the records remain locked.

Describe what happens when COMMIT is pressed.

Discuss the procedure for maintaining an audit trail of the case.

Unlocking action records deletes the lock action record (**920 - ACTION RECORDS LOCKED**) from the case's actions, and allows deletion and editing of the affected action records. To maintain an audit trail, add action code **974-AUTOMATED RECORDS VERIFIED** to the case using one of the update action forms.

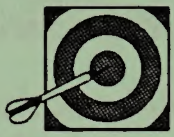
Review the Quirks subsection point by point and briefly summarize the Unlock Action Records form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Quirks and special data issues for CASE108F:

- When you unlock action records using this form, the System automatically deletes the lock action record from the case's actions, allowing deletion and editing of the previously locked action records.
- This form can be used to unlock action records locked on a certain date so that you can relock the action records at a later date using CASE106F.
- Once action records for the case are unlocked, all action records in the case can be altered or deleted.
- The same action lock word used to lock the action records is required to unlock them.

Unlock Land Records Form (CASE109F)



30 minutes
(including Exercise C-5)

Review the purpose of the Unlock Land Records form.

Purpose and use of the Unlock Land Records Form:

This form allows you to unlock previously locked land records within an established case. When you use this form, previously locked land records in the specified case are released for update, allowing addition, deletion and editing of the case's land records.

Use the Unlock Land Records Form (CASE109F) to restore update access to the land records for a specific case.

Review who uses this form and why.

BLM personnel responsible for unlocking and updating land records for existing land or mineral cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

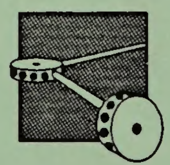
Navigation to this form and use of CASE109F program name in QXFER:

The Unlock Land Records Form (CASE109F) is an option on the Lock/Unlock Action/Land Records Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu, then the Lock/Unlock Action/Land Records Menu option from the Case Processing Menu, and finally the Unlock Land Records option from the Lock/Unlock Action/ Land Records Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE109F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

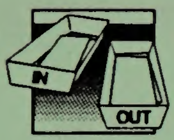
- Case Serial Number.
- Land Lock Word.



Review this form's structure and the types of data that can be entered, retrieved.

Structure of the form:

The Unlock Land Records Form consists of a single page containing fields specifically related to unlocking all land records in an established case in the Interim System.



Review and demonstrate the step-by-step workflow for the Unlock Land Records form.

Use the available training aids as needed.

Work flow within this form and a review of the form's fields:

STEP 1

Enter a valid case serial number for a case with locked case land records at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Mention that only cases with locked lands are allowed.

If you enter an invalid serial number or the serial number of a case in which land records are not locked, an error message appears on the message line, and the cursor returns to the Geo State field.

If the case contains locked lands, the cursor moves to the Employee Initials field.

STEP 2

The Employee Initials and Office Code fields are optional.

Mention that the Employee Initials and Office Code fields are optional.

Enter your initials or the initials of the employee who authorized the unlocking of land records for the case, if desired.

Enter your office code or the code identifying the office responsible for authorizing the unlocking of the case's land records, if desired.

STEP 3

Enter the land lock word that correctly identifies the confidential word previously used to lock the land records.

Review the importance of lock land words.

WARNING:

The same land lock word used to lock the land records is required to unlock them.

Describe what happens when COMMIT is pressed.

Press COMMIT to unlock the land records for this case. If you press EXIT without committing the unlock transaction, the records remain locked.

Discuss the procedure for maintaining an audit trail in a case.

Unlocking land records deletes the lock land record (**975 - LAND RECORDS LOCKED**) from the case's actions, and allows addition, deletion, and editing of the case's land records. To maintain an audit trail, add action code **974 - AUTOMATED RECORD VERIFIED** to the case using one of the update action forms.

Review the Quirks subsection point by point and briefly summarize the Unlock Land Records form.

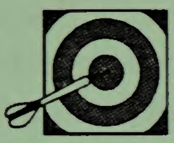
Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise C-5** (Lock/ Unlock Action/Land Records).*

Quirks and special data issues for CASE109F:

- When you unlock land records using this form, the System automatically deletes the lock land record from the case's actions, allowing addition, deletion, and editing of the previously locked case land records.
- Once land records for the case are unlocked, land records can be added to the case, changed or deleted.
- The same land lock word used to lock the land records is required to unlock them.

Update Parcel Occupancy Form (CASE146F)



Purpose and use of the Update Parcel Occupancy Form:

10 minutes

Review the purpose of the Update Parcel Occupancy form, emphasizing that it is used only for Alaska Native Allotment cases.

Note:

This form is used only for Alaska Native Allotment cases (case type `256100`), and records the claimed occupancy date(s) for allotment parcel(s). Establish parcels within the action and land records of a case using the Update Action Records Form (CASE127F), the Update Case Land Records Form (CASE125F), or any of the establish case forms. All parcels given an occupancy date should exist in the case file in the action and land records.

This form allows you to add, change or delete parcel occupancy data in an established Alaska Native Allotment case.

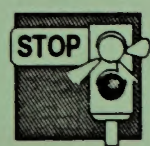
Review who uses this form and why.

BLM personnel responsible for updating parcel occupancy information for existing Alaska Native Allotment cases in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE146F program name in QXFER:

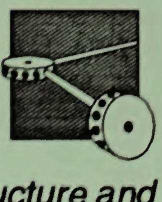
The Update Parcel Occupancy Form (CASE146F) is an option on the Case Processing Menu. It is accessed by choosing the Case Processing Menu option from the Interim System Main Menu and then the Update Parcel Occupancy option from the Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE146F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

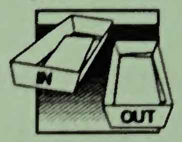
- Case Serial Number.
- Parcel Code and Occupancy Date Year.



Review this form's structure and the types of data that can be entered, retrieved and updated.

Structure of the form:

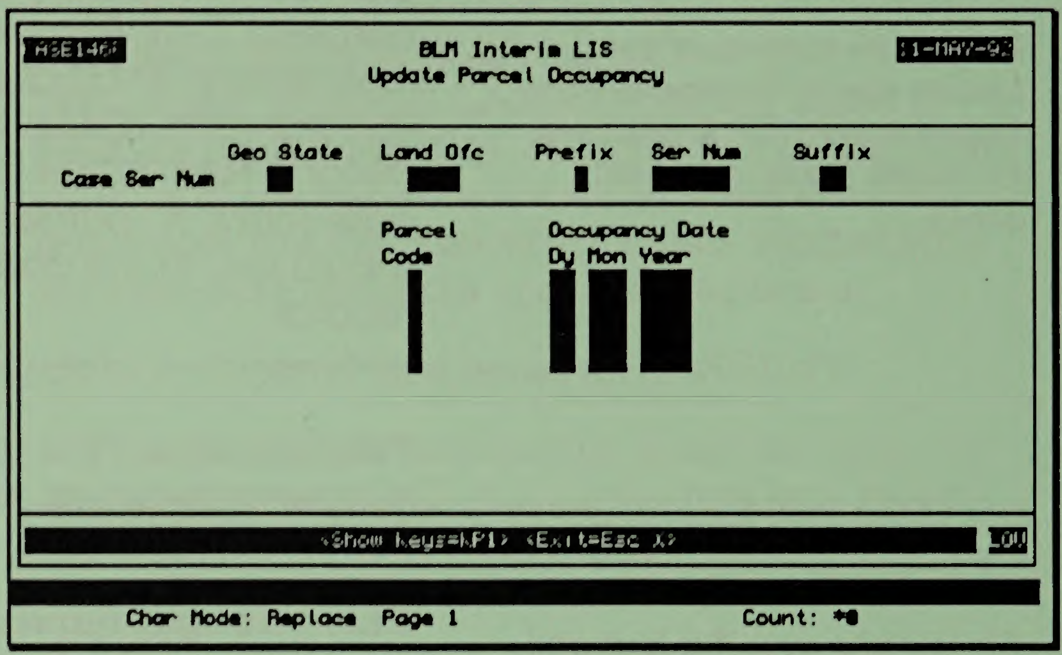
The Update Parcel Occupancy Form consists of a single page containing fields specifically related to parcel occupancy date records in an established case in the Interim System.



Work flow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Update Parcel Occupancy form.

Use the available training aids as needed.



STEP 1

Enter a valid case serial number for an Alaska Native Allotment case at the top of the form. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Demonstrate and discuss LOV where available.

Mention again that only case serial numbers for Alaska Native Allotments are accepted.

NOTE:

Only Alaska Native Allotment case serial numbers are accepted by this form.

All existing parcel occupancy data for the case appears in the appropriate fields on the form, and the cursor moves to the first parcel occupancy record's Parcel Code field.

If no parcel occupancy data exists for the case, the following message appears:

`Query caused no records to be retrieved.`

If an occupancy date was previously saved for the case without an associated parcel code, the following message appears when the form displays existing parcel occupancy information:

```
NO PARCELS ESTABLISHED FOR THIS CASE NUMBER
```

STEP 2

To add a parcel occupancy record, move to a blank record, if necessary (use CREATE RECORD).

Enter the parcel code identifying the native allotment.

Enter the day, month abbreviation and four-digit year of the date the customer claims to have initially occupied the parcel in the Occupancy Date fields. COMMIT your additions before exiting the form.

Mention that only the occupancy date's year is required, but if a day is entered then a month is also required.

NOTE:
Only the occupancy date's year is required. If you enter a day, however, you must also enter a month abbreviation.

Mention that additions, changes and deletions can be made in the same session but that COMMIT must be pressed to save changes before exiting the form.

To update an existing parcel occupancy record, move to that record and add, change or delete data as needed. COMMIT your updates before exiting the form.

To delete an existing parcel occupancy record, move to that record, and press DELETE RECORD. Although the record is removed from the form, you must press COMMIT to truly delete the record from the database.

Review the Quirks subsection point by point and briefly summarize the Update Parcel Occupancy form.

Quirks and special data issues for CASE146F:

- This form is used only for Alaska Native Allotment cases (case type `256100`), and records the claimed occupancy date(s) for allotment parcel(s). All parcels given an occupancy date should exist in the case file in the action and land records.
- Only Alaska Native Allotment case serial numbers are accepted by this form.
- Only the year of the occupancy date is required, but if you enter a day, you must also enter a month abbreviation.

- Although the information entered and displayed on this form relates to parcels established in the action and case land records of a case, there is neither a direct link in the System nor any verification or comparison between parcel occupancy records and action or case land records.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

30 minutes
(Course review and summary, questions, close-out and course evaluations.)

Briefly review and summarize the material covered in the Case Processing Course.

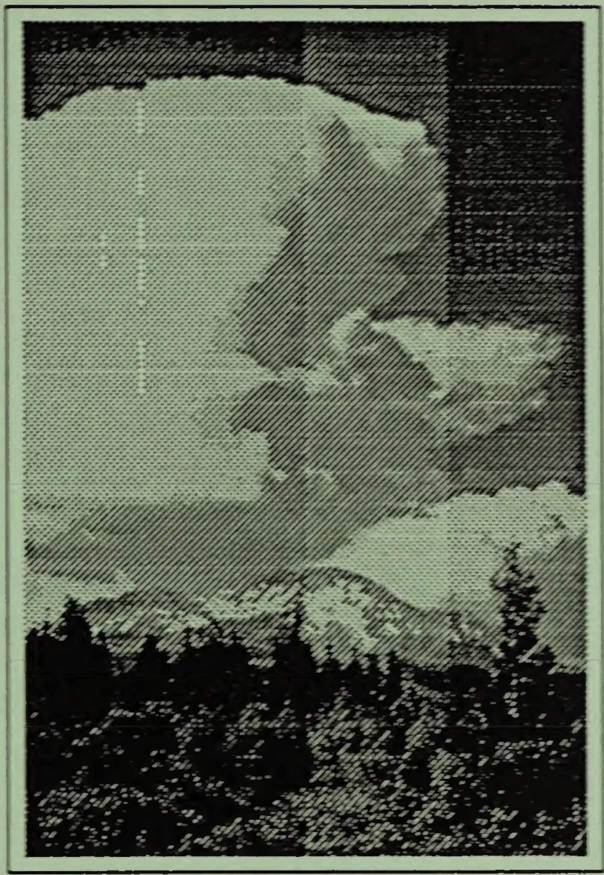
Prompt for and answer any remaining questions.

Close-out with the class and have each participant fill out a Course Evaluation form.

D

D. Customer Processing Training Guide

Instructor's Version
Includes Teaching Notes



The purpose of this course is...

- To teach students to perform customer processing functions using the Interim System forms. These functions include:
  - adding customer database information
  - maintaining customer database information
  - deleting customer database information
  - finding current customer data
  - querying historical customer data
  - generating reports concerning customer data

1. The Interim System Customer Processing Course

1.1 Participants

10 minutes
(Instructor Introductions, Purpose on page 1, Participants, Prerequisites and Questions.)

The Interim System Customer Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update, deletion and query of customer information in the Interim System database. This portion of the Interim System is restricted to a select number of BLM employees responsible for the maintenance of Interim System customer data. Only BLM employees responsible for either customer processing tasks or the support or supervision of such tasks should participate in this course.

Individuals participating in this course should fit clearly into at least one of the following personnel categories:

Emphasize who should and should not be in this class.

Ad-Hoc Data Query Personnel
This category of users develops ad-hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Customer Processing Personnel
Individuals in this category maintain the integrity of the Interim System customer database. These individuals add, delete and update customer information on a regular basis.

System Application Support & Maintenance Personnel
Individuals in this category maintain the operational status of the Prime computers and the Interim System software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

Emphasize that this course will make little sense to those who have not taken the prerequisite course.

• Exposure to and understanding of the information presented in the *Interim System Data Retrieval (BLM)* course.

Although the Interim System Customer Processing course will contain a brief review and question and answer session concerning the concepts, terms and access procedures (Prime and Interim System) taught in the prerequisite courses, students should already be familiar with this material. Students should also be familiar with the purposes and use of Interim System forms in Report Processing and Data Retrieval Functions. Interim System Customer Processing trainers will assume that participants need only a quick warm-up before launching into new information. Students should review all the training materials they received in the prerequisite course before coming to class.

All Interim System Customer Processing course participants should be familiar with the following topics:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What kinds of data manipulations the Interim System can perform.
- Interim System database and Structured Query Language (SQL) concepts and terminology.
- How to access and navigate on the Prime.
- How to access the Interim System and use Interim System/Oracle® login procedures.
- Interim System security.
- Interim System structure, system map, and basic navigation in the menu-driven Interim System.
- Functional use of Interim System Report Processing and Data Retrieval Functions.

- Proper use of the forms in Report Processing and Data Retrieval Functions for the performance of all on-line and off-line data retrieval tasks in the Interim System database.

Prompt for and answer questions.

15 minutes
(Ice Breaker, Housekeeping, Rules and Attendance.)

For an ice breaker have all students fill out name tags/ place cards and introduce themselves.

Review the housekeeping rules for the classroom.

Pass the attendance sign-in sheet around the class.

2. Purpose of Customer Processing Course

10 minutes

(Restate the Purpose of this Course, What is Customer Processing?, AALRS Tasks Covered in this Course, Course Objectives and the Course Schedule.)

Restate the purpose of the Customer Processing course.

To teach students to perform customer processing functions using the Interim System forms. These functions include: adding, maintaining or deleting customer database information, finding current customer information, querying historical customer data, and generating reports concerning customer data.

2.1 What is Customer Processing?

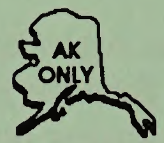
Explain what customer processing is in general and briefly review the tasks performed using the forms in this section of the System.

Refer to the System Map when reviewing customer processing tasks and forms.

This course uses the term customer processing to address the set of automated tasks that affect customer information stored in the customer tables of the Interim System database. Customer processing may also be performed by the same personnel performing case processing functions. Specifically, customer processing includes the following tasks:

- **Adding** new customers (name and address information, etc...) to the customer tables of the Interim System database.
- **Deleting** existing customers from the current customer tables of the Interim System database.
- **Updating** information associated with existing customers in the current customer tables of the Interim System database.
- **Finding** and displaying current customer information in the Interim System database.
- **Querying** the Interim System database for historical customer data.
- **Generating** reports from the Interim System database that contain either current customer information or historical customer information.

2.2 AALRS Tasks Covered in This Interim System Course



Briefly review the AALRS tasks addressed in this course.

Emphasize that the Interim System allows users to perform all of the customer processing tasks formerly performed by AALRS.

- Retrieve a customer name from the database by alphabetic search or customer name ID number.
- Establish a new customer name within the Interim System database.
- Remove a customer name from the Interim System database.
- Change an address of a current customer name.
- Change the type of customer code of a serialized case by adding, changing or deleting text.
- Retrieve help reference for a specified data field.
- Retrieve listings of all entries and descriptions possible within a coded data element.

3. Customer Processing Course Objectives

Write Objectives on a flipchart as each is reviewed.

The performance objectives outlined below should be met upon completion of the Interim System Customer Processing course.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the menu-driven Interim System, moving among the Interim System Main Menu, the Customer Processing Menu, and the submenu and forms used for automated customer processing tasks.
- access and use the Add/Delete Customer Form (CUST100F) and the Maintain Customer File Form (CUST101F) to add, change or delete customer information in the Interim System customer database.
- access and use the FIND-Customer Form (CUST400F) and the Query Customer History Form (CUST104F) to perform on-line retrievals of current and historical customer information from the Interim System customer database.
- access and use the Customer Processing Report forms (CUST200F, CUST201F and CUST202F) to enter selection criteria information and request off-line Interim System customer reports.

Review the class schedule.

Prompt for and answer questions.

4. Menu-by-menu, Form-by-form

10 minutes

Introduce the Menu-by-menu, Form-by-form module, its purpose and its organization into sections and subsections.

Prompt for and answer questions concerning each type of section in this module (Purpose, Navigation, Workflow, etc...) before moving on to discuss the next type of section.

Use the appropriate training aids as needed for each menu and form section: Instructor/ Student computers, keyboard templates, LCD panel and overhead projector, training database, training wall displays, System Map, flipcharts, whiteboards, markers, this training guide, System Documentation and the Data Element Dictionary.

Purpose of this module of the course:

The purpose of this training module of the Interim System Customer Processing course is to present the purpose and intended use of each form and submenu in Customer Processing. This module also provides an overview of the types of customer data addressed on each Customer Processing form.

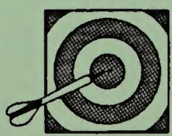
Note:
While the utility of each submenu and form is reviewed (along with a brief look at each form's fields), this module is not meant to present an in-depth look at each and every field.

Please see the Interim System documentation for a more thorough discussion of each field and the customer information for which each is designed.

Organization of this course module:

This module of the Customer Processing Training Guide is divided into numerous sections, one for each submenu and form in Customer Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose**, **Navigation**, **Required Data**, **Structure**, **Workflow**, and **Quirks** .

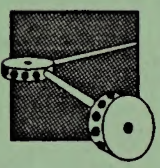
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs which describe the contents of each subsection.



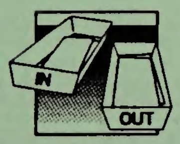
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data, the Structure subsection lists them. This subsection may also discuss whether a form is divided into several blocks of fields, and whether these separate blocks address different categories of data.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

Note:
In the sections of a few forms in this module, there are two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Customer Processing Menu

5 minutes

Discuss navigation to the Customer Processing menu from the Main Menu.

Review the general purpose of each menu option.

Refer to the Customer Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions.

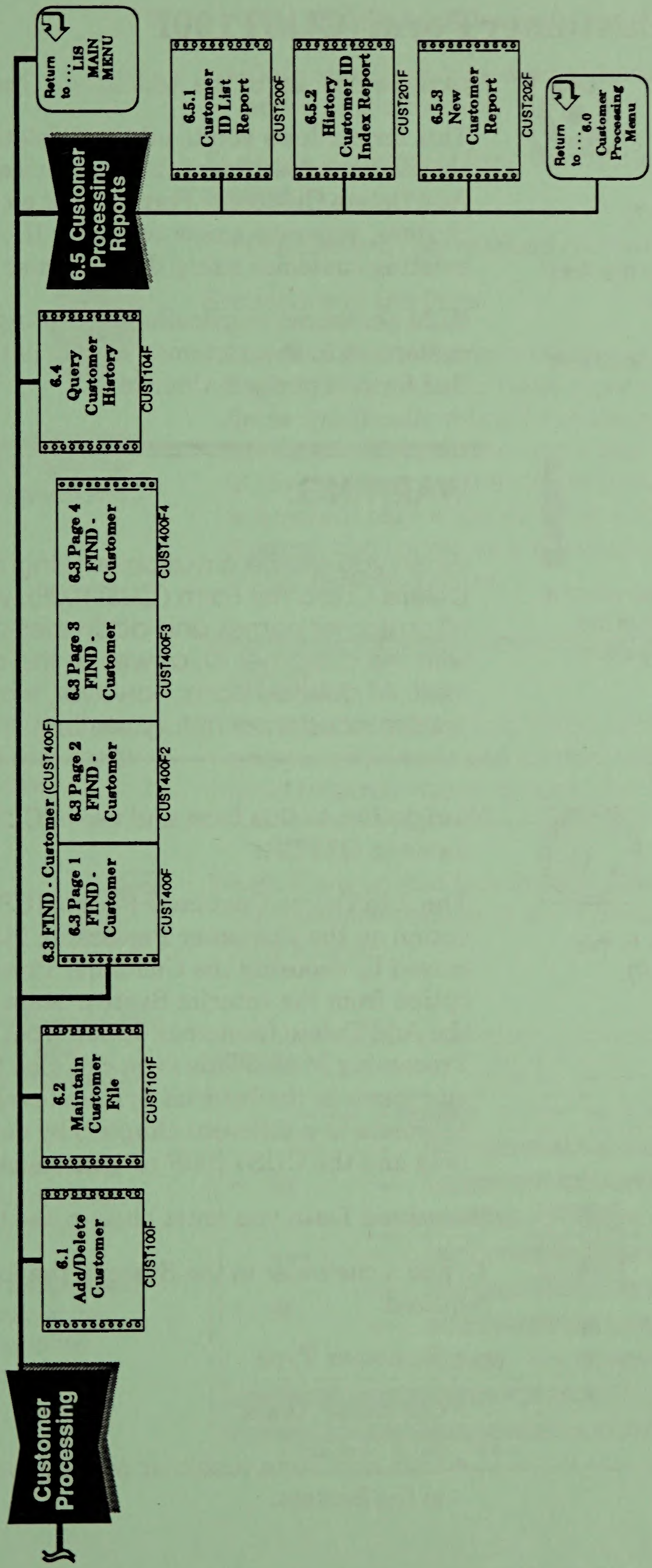
Customer Processing includes several tasks requiring data and System privileges restricted to a limited number of users. There are six sections or options on the Customer Processing Menu:

The Customer Processing Menu itself identifies the options available. Each section has its own functions and purpose within the Customer Processing environment and the overall System. This Interim System training class presents an overview of each menu option and/or the form(s) accessible within them.

Note:

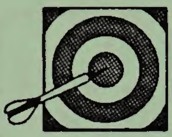
The Interim System Main Menu option returns you to the menu one level higher in the system from which you can access other options in the Interim System.

Customer Processing encompasses an independent section of the System separate from land and mineral case information. It is possible for a customer's data to reside in the System's customer section, but not be associated with any cases in the System. However, a customer **must** exist in the customer section of the System to be included in a case.



Customer Processing
6.1 Add/Delete Customer
CUST100F
6.2 Maintain Customer File
CUST101F
6.3 FIND - Customer (CUST400F)
6.3 Page 1 FIND - Customer
CUST400F
6.3 Page 2 FIND - Customer
CUST400F2
6.3 Page 3 FIND - Customer
CUST400F3
6.3 Page 4 FIND - Customer
CUST400F4
6.4 Query Customer History
CUST104F
6.5 Customer Processing Reports
Return to . . . LIS MAIN MENU
6.5.1 Customer ID List Report
CUST200F
6.5.2 History Customer ID Index Report
CUST201F
6.5.3 New Customer Report
CUST202F
Return to . . . 6.0 Customer Processing Menu

Add/Delete Customer Form (CUST100F)



35 minutes
(Including Exercise D-1)

Review the purpose of the Add/ Delete Customer form.

Review who uses this form and why.

Purpose and use of the Add/Delete Customer Form:

This form allows you to add and delete customers in the customer section of the System's database. Use the Add/Delete Customer Form to add a customer to the System, generate a new customer ID, or delete an existing customer using the customer ID.

BLM personnel responsible for adding or deleting customers in the customer section of the System use this form to perform their task.

Describe what happens when a customer is deleted from the active portion of the System.

WARNING:

When you delete a customer using the Add/ Delete Customer Form (CUST100F), you will delete all customer names and addresses associated with the customer ID, as well as the customer ID itself. All deleted data, however, is archived in the System's customer history section.

Review the navigation to this form (including QXFER).

Navigation to this form and use of CUST100F program name in QXFER:

The Add/Delete Customer Form (CUST100F) is an option on the Customer Processing Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu and then the Add/Delete Customer option from the Customer Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST100F program name.

Discuss the data required to use this form.

Required Data you must have to use this form:

To add a customer to the System, the following are required:

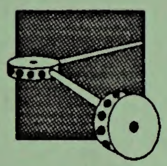
- Customer Type.
- Customer Name.
- Date and Time customer name information is added to the System.

• City and State of the customer's address.

• Date and Time customer address information is added to the System.

To delete a customer from the System, the following is required:

• Customer ID (or existing customer name).



Review this form's basic structure and the types of data that can be entered, retrieved and deleted.

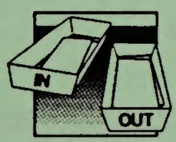
Structure of the form:

The Add/Delete Customer Form consists of two pages. Page 1 is divided into three separate blocks containing fields specifically related to customer information (customer ID, customer name and customer address) in the customer section of the Interim System. Page 2 is accessed only when deleting a customer from the System, and serves as a warning screen before an a actual deletion occurs.

Mention that NEXT/PREVIOUS BLOCK can be used to easily move around this form.

NOTE:

This form is divided into three clear blocks of fields, and function keys associated with blocks can be used to easily move around the form.

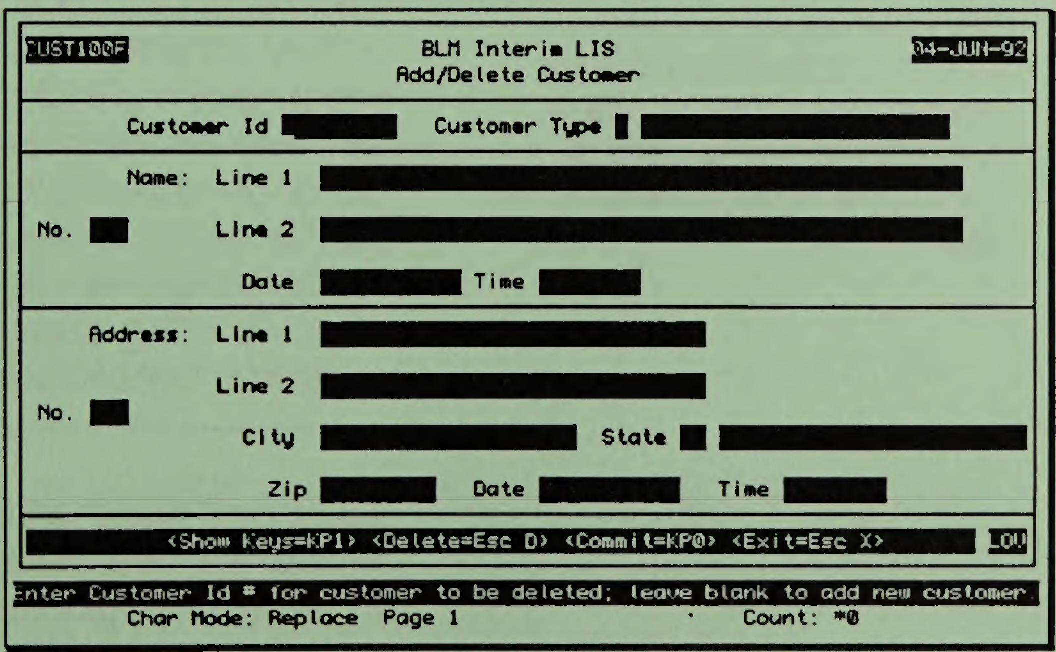


Work Flow within this form to **add** a new customer to the customer section of the System and a review of the form's fields:

Note:
There are two workflows for this form – one to ***add*** *a new customer and one to* ***delete*** *an existing customer.*

Review and demonstrate the step-by-step workflow to ***add*** *a new customer to the System.*

Use the available training aids as needed (particularly the Interim System Customer Tables wall display).



CUST100F BLM Interim LIS 04-JUN-92
Add/Delete Customer

Customer Id Customer Type

Name: Line 1
No. Line 2
Date Time

Address: Line 1
Line 2
No. City State
Zip Date Time

<Show Keys=KP1> <Delete=Esc D> <Commit=KP0> <Exit=Esc X> LOV

Enter Customer Id # for customer to be deleted; leave blank to add new customer.
Char Mode: Replace Page 1 Count: *0

STEP 1

Emphasize that, to add a customer, an ID is not entered.

Do not enter a customer ID.

Press NEXT FIELD in the blank Customer ID field, move to the Customer Type field.

Warn students that entering a customer ID is the first step in deleting an existing customer.

!

WARNING:

Do not enter a customer ID if you are adding a new customer to the customer section of the System; skip the Customer ID field and move to the Customer Type field. If you enter a customer ID, this form assumes that you are deleting an existing customer.

Demonstrate and discuss LOV where available.

The required Customer Type field defaults to U (Unknown). Accept the default, or replace it with the appropriate customer type code. Use the List of Values (LOV) available, if necessary. If you intentionally leave the Customer Type field blank, the System automatically fills it with a U when you COMMIT a customer to the database.

STEP 2

Enter the required name in the Line 1 field in the Customer Name block. Follow the standard name guidelines provided in the Entering Names and Addresses section of the Interim System *Introductory Materials* documentation.

Discuss how the System may warn that an entered name already exists in the active or historical customer database and emphasize the need to avoid entering duplicate customers.

NOTE:

If you enter a name that already exists in the active or historical (i.e., archived) customer sections of the System, a warning message appears on the message line. Although you may continue entering name and address information for the new customer on this form, it may be advisable to first use the FIND-Customer Form to check existing customer data in the System for this customer before adding them using CUST100F.

Enter additional information, if any, that needs to appear with the customer's name in the optional Line 2 field in the Customer Name block.

The required Date and Time fields indicate the when the customer's name is added to the System. Today's date and the current time are the defaults. Either accept the defaults or enter the desired values.

STEP 3

Enter the first and second lines of the customer's address in the optional Line 1 and Line 2 fields, respectively, in the Customer Address block. Follow the standard address guidelines provided in the Entering Names and Addresses section of the Interim System *Introductory Materials* documentation.

Mention that City and State are the only entries required in the address block and that the first three digits of the ZIP Codes are validated against the specified state and area.

Enter the required city and two-letter state abbreviation in the Customer Address block. Enter the optional ZIP code, if desired. Use the Lists of Values (LOV) available in the State and ZIP code fields, if necessary. The first three positions of entered ZIP codes are validated for the correct state.

As in the Customer Name block, either accept or change the current date and time values that indicate when the customer address is added to the System. These fields are required.

STEP 4

When the data on the form is correct for the new customer, press COMMIT to save the data in the customer section of the System.

Explain what happens when an entered name and address combination exactly matches one already in the System.

NOTE:
If you have entered a name/address combination that exactly matches one already in the database, the System will not permit you to COMMIT this data and generate a second Customer ID for the duplicate customer.

Thoroughly explain the importance of and relationships among Customer ID, Name Numbers and Address Numbers. Refer to the Interim System Customer Tables wall display.

After you successfully commit a new customer's data to the database, a new customer ID number is generated automatically, and the Number fields in both the Customer Name and Customer Address blocks fill with `001`.

Mention that no warning is provided if EXIT is pressed before COMMIT.

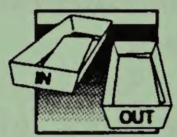
If you EXIT without pressing COMMIT, the System does not display a warning message and does not give you a chance to save your entry; you lose the entered data and return to the last accessed menu.

Emphasize that only one name and address record can be added to a new customer on this form (name and address number 001). Emphasize the use of CUST101F to add additional names and/or addresses.

Note:

Although many customer names and customer addresses, each assigned a name number or address number by the System, may be associated with a customer ID, this form allows you to enter only one customer name and Address (automatically assigned name number **001** and address number **001**) for the new customer. To add additional names and/or addresses to this customer ID, use the Maintain Customer Form (CUST101F).

or...



Work flow within this form to **delete** a customer from the customer database:

*Review and demonstrate the step-by-step workflow to **delete** an existing customer from the System.*

Emphasize that customers linked to case(s) cannot be deleted.

Note:

The System will not allow you to delete a customer currently associated with case(s) in the System. You must verify that the customer you are deleting is not linked to any case(s) before using this form to delete them from the database.

STEP 1

Enter the customer ID of the customer you want to delete in the block of fields at the top of the form.

Emphasize that a customer's ID must be entered to delete them from the System.
Mention that if an invalid ID is entered it is cleared from the form and the program moves on, assuming that you wish to enter a new customer.

If you enter an invalid ID, the form clears the Customer ID field and moves the cursor to the Customer Type field, just as if you were entering a new customer information. To return to the Customer ID field and reenter an ID number, press CLEAR FORM.

Discuss and demonstrate using the Customer Information screen, including entering and executing a query using the optional wildcard character.

If you know the name of the customer you want to delete from the System, but do not know their customer ID, press LOV in the Customer ID field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Add/Delete Customer Form. Move to the Customer Name field, enter the name as it would be stored in the database, and press EXECUTE QUERY. Use the wildcard character, %, in the name, if necessary. The System retrieves all names in the database that match

the name entered, and you may scroll through them one at a time using NEXT/PREVIOUS RECORD. When you locate the customer you want to delete from the System, press NEXT FIELD and return the customer ID to the Add/Delete Customer Form.

When you press NEXT FIELD with an appropriate number in the Customer ID field, the first customer name and address associated with the specified customer ID appears on the form.

!

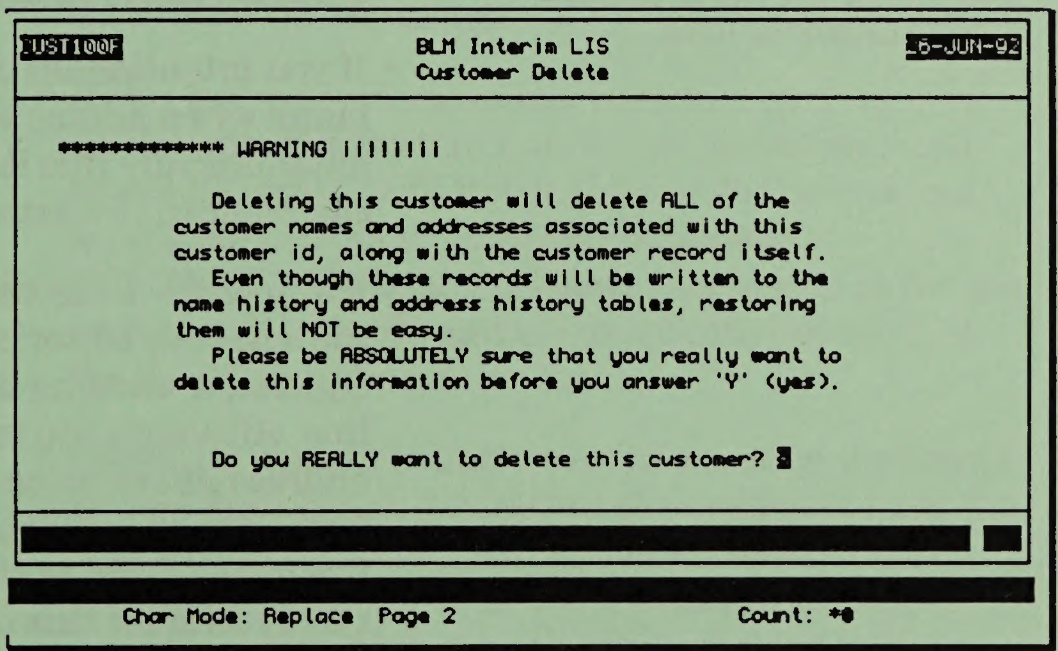
WARNING:
Carefully verify the customer information displayed on this form before you delete the customer from the Interim System database.

STEP 2

Thoroughly review what happens, both on this form and in the database, when DELETE RECORD is pressed and the user acknowledges the deletion on page 2 of the form.

Discuss the customer history section of the database.

Press DELETE RECORD to delete the displayed customer ID and **all** associated name and address data from the System. The cursor moves to page 2.


CUST100F BLM Interim LIS 16-JUN-92
Customer Delete

************** WARNING !!!!!!!!

Deleting this customer will delete ALL of the customer names and addresses associated with this customer id, along with the customer record itself.
Even though these records will be written to the name history and address history tables, restoring them will NOT be easy.
Please be ABSOLUTELY sure that you really want to delete this information before you answer 'Y' (yes).

Do you REALLY want to delete this customer?

Char Mode: Replace Page 2 Count: *0

Page 2 displays a warning regarding the deletion of customer data from the System's active database. Enter a `Y` or `N` to answer the question, `Do you REALLY want to delete this customer?`, at the bottom of this screen.

Enter a `Y` to delete the customer and all associated customer data from the System. The cursor returns to the Customer ID field on page 1, the form clears, and the following message appears on the message line:

`Previous Customer data has been archived to history`

Although deleted customer data is archived in the System's customer history section, restoring this information to the active customer database is difficult.

Enter an `N` to cancel the deletion and return the cursor to the Customer ID field on page 1. Press CLEAR FORM in the Customer ID field before continuing to use this form.

Review the Quirks subsection point by point and briefly summarize the use of the Add/ Delete Customer form.

Quirks and special data issues for CUST100F:

- Do not enter a customer ID if you are adding a new customer to the customer section of the System; skip the Customer ID field and move to the Customer Type field. If you enter a customer ID, this form assumes that you are deleting an existing customer.

- If you intentionally leave the Customer Type field blank when adding a new customer, the System automatically fills it with a `U` when you COMMIT a customer to the database.

- If you enter a customer name that already exists in the active or historical customer sections of the System, a warning message appears on the message line. Although you may continue entering name and address information for the new customer on this form, it may be advisable to first use the FIND-Customer Form to check existing customer data in the System for this customer before adding them using CUST100F.

- If you have entered a name/address combination that exactly matches one already in the database, the System will not permit you to COMMIT this data and generate a second Customer ID for the duplicate customer.

- This form is divided into three clear blocks of fields, and function keys associated with blocks can be used to easily move around the form.

- If you EXIT without pressing COMMIT, the System does not display a warning message and does not give you a chance to save your entry.

- Although many customer names and customer addresses, each assigned a name number or address number by the System, may be associated with a customer ID, this form allows you to enter only one customer name and Address (automatically assigned name number 001 and address number 001) for the new customer. To add additional names and/or addresses to this customer ID, use the Maintain Customer Form (CUST101F).

- When you delete a customer using this form, you delete all customer names and addresses associated with the customer ID, as well as the customer ID itself. All deleted data, however, is archived in the System's customer history section.

- The System will not allow you to delete a customer currently associated with case(s) in the System. You must verify that the customer you are deleting is not linked to any case(s) before using this form to delete them from the database.

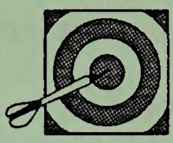
- If you know the name of the customer you want to delete from the System, but do not know their customer ID, press LOV in the Customer ID field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Add/Delete Customer Form.

- Carefully verify the customer information displayed on this form before you delete the customer from the Interim System database. Although deleted customer data is archived in the System's customer history section, restoring this information to the active customer database is difficult.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise D-1** (Add/ Delete Customer).*

Maintain Customer File Form (CUST101F)



35 minutes
(Including Exercise D-2)

Review the purpose of the Maintain Customer File form, emphasizing that it affects customers' names and addresses, not their ID's.

Purpose and use of the Maintain Customer Form:

This form allows you to add, change and delete customer names and addresses within a specified customer ID.

When you add, change or delete a customer name or address within a customer ID using this form, you add, change or delete only the specified customer name or address, not the entire customer ID file. The System archives old changed and deleted data in the customer history section of the database. Customer history data is accessed through the Query Customer History Form (CUST104F) using the customer ID.

Review who uses this form and why.

BLM personnel responsible for maintaining customer name and address information for existing customers in the customer database use this form to perform their task.

Review the relationships among customer ID, customer names and customer addresses. Refer to the Interim System Customer Tables wall display.

Note:
Customer names and addresses are not directly related to each other. They are indirectly related through their independent associations with the same customer ID. It is not necessary to associate the name and the address of a customer with the same name number and address number.

Review the navigation to this form (including QXFER).

Navigation to this form and use of CUST101F program name in QXFER:

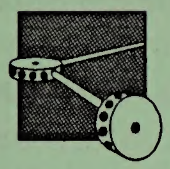
The Maintain Customer Form (CUST101F) is an option on the Customer Processing Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu and then the Maintain Customer option from the Customer Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST101F program name.

Discuss the data required to use this form.

Required Data you must have to use this form:

- Customer ID (or existing customer name).

- Addition(s), change(s) or deletion(s) to the customer type, customer name or customer address data associated with the specified customer ID.



Review this form's basic structure and the types of data that can be entered, retrieved and deleted.

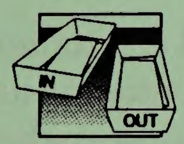
Mention that NEXT/PREVIOUS BLOCK can be used to move easily around on this form.

Structure of the form:

The Maintain Customer Form consists of a single page divided into three separate blocks containing fields specifically related to customer information (customer ID, customer name and customer address) in the customer section of the Interim System.

NOTE:

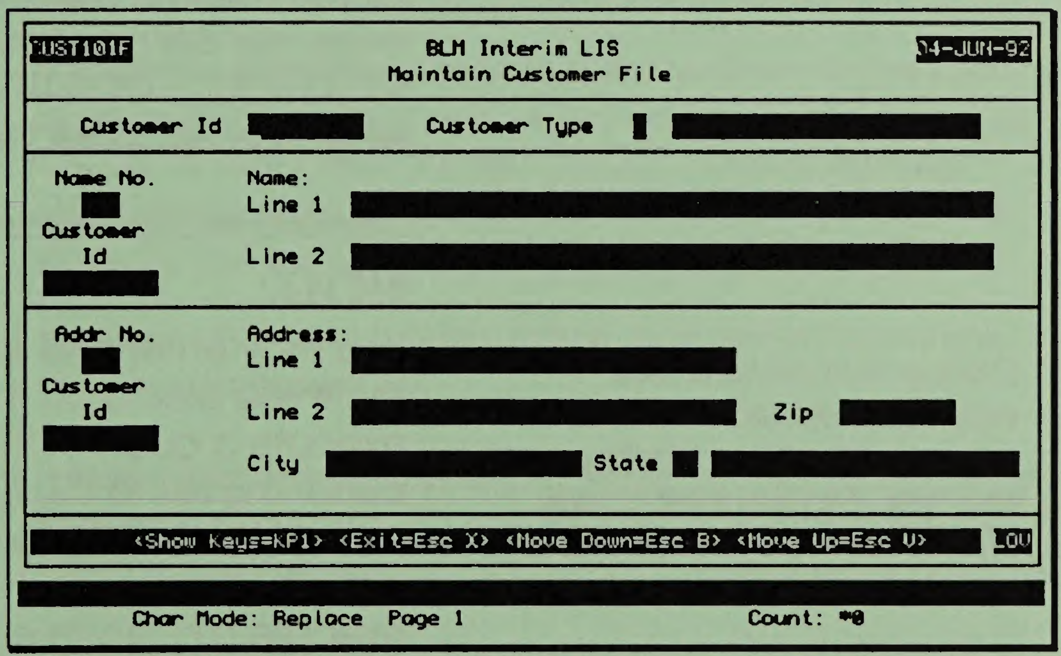
This form is divided into three clear blocks of fields, and function keys associated with blocks can be used to easily move around the form.



Review and demonstrate the step-by-step workflow for the Maintain Customer File form.

Use the available training aids as needed, particularly the Interim System Customer Tables wall display.

Work flow within this form and a review of the form's fields:


CUST101F BLM Interim LIS 04-JUN-92
Maintain Customer File

Customer Id Customer Type

Name No. Name:
Line 1
Customer Id Line 2

Addr No. Address:
Line 1
Customer Id Line 2 Zip
City State

<Show Keys=KP1> <Exit=Esc X> <Move Down=Esc B> <Move Up=Esc U> LOV

Char Mode: Replace Page 1 Count: *0

STEP 1

Enter a valid customer ID in the block of fields at the top of the form. A customer ID is required.

Demonstrate and discuss LOV where available.

If you only know the name of the customer for whom you want to update information, press LOV in the Customer ID field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Add/Delete Customer Form. Move to the Customer Name field, enter the name as it would

be stored in the database, and press EXECUTE QUERY. Use the wildcard character, %, in the name, if necessary. The System retrieves all names in the database that match the name entered, and you may scroll through them one at a time using NEXT/PREVIOUS RECORD. When you locate the customer for whom you want to update information, press NEXT FIELD and return the customer ID to the Maintain Customer Form.

When you press NEXT FIELD with a valid number in the Customer ID field, the lowest numbered customer name and address associated with the specified customer ID appear on the form, the Customer ID fields in both the Customer Name and Address blocks automatically fill with the specified customer ID, and the cursor moves to the Customer Type field.

Update the customer type, if necessary.

The Customer Name and Customer Address blocks allow you to work with customer name and address records independently. Adding, changing or deleting a name or address effects only that record; all other name and address records remain unaffected. Use NEXT/PREVIOUS BLOCK to quickly move back and forth between these two blocks.

Discuss and demonstrate entering and executing queries in each of the three blocks on this form. Review what type(s) of data are retrieved and can be updated.

NOTE:

You may enter and execute queries in any one of the three blocks on this form. If you enter and execute a query in the Customer ID block, the cursor moves to the Customer Name block, and you may proceed to update name and address data for the queried customer ID. If you enter and execute a query in either the Customer Name or Address block, data are retrieved for only that block. You may update customer data (name or address) in that block only for the customer ID associated with the queried data. To enter and execute a query in one of these blocks, move to the block and press ENTER QUERY (in some instances, you may need to press this key twice to clear the block's Customer ID field). Enter your query parameters, press EXECUTE QUERY, and make updates as needed.

STEP 2

In the Customer Name block, use NEXT/PREVIOUS RECORD to scroll through the names associated with the current customer ID. The customer ID may have multiple names, each identified by a sequential number within the ID.

Discuss and demonstrate updating a customer's name data. Explain the archival of updated information.

To change an existing customer name, locate it with the function keys, and make the changes as needed. You may not access the Name Number and Customer ID fields in this block. Press COMMIT before exiting this form to save the changes and archive the old, unchanged name in the customer history section of the database.

To add a new customer name to the current customer ID, press CREATE RECORD. Enter the required first and, if necessary, optional second line of the customer's name in the Customer Name block. Press COMMIT before exiting this form to save the new customer name. The next sequential name number for the customer ID is associated with the new name.

Emphasize that a name that is identical to an existing name within an ID cannot be added.

You cannot add a customer name identical to an existing customer name for this customer ID.

Mention that COMMIT must be pressed after DELETE RECORD.

To delete an existing customer name from the current customer ID, locate it with the function keys and press DELETE RECORD. Press COMMIT before exiting this form to save the deletion and archive the deleted name in the customer history section of the database.

Emphasize that when only one name exists for an ID it cannot be deleted.

You cannot delete a name when only one name exists within a customer ID.

!

WARNING:

Carefully verify that your cursor is on the customer name record you want to delete before pressing DELETE RECORD and COMMIT.

STEP 3

In the Customer Address block, use NEXT/PREVIOUS RECORD to scroll through the addresses associated with the current customer ID. The customer ID may have multiple addresses, each identified by a sequential number within the ID.

Discuss and demonstrate updating a customer's address data. Explain the archival of updated information.

To change an existing customer address, locate it with the function keys, and make the changes as needed. You may not access the Address Number and Customer ID fields in this block. Press COMMIT before exiting this form to save the changes and archive the old, unchanged address in the customer history section of the database.

Mention that a city and state are the only required entries for an address and that the first three digits of the ZIP Code are validated against the specified state.

To add a new customer address to the current customer ID, press CREATE RECORD. Enter the optional first and, if necessary, second line of the customer's address in the Customer Address block. Enter the required city and two-letter state abbreviation. Enter the optional ZIP code, if desired. Use the Lists of Values (LOV) available in the State and ZIP code fields, if necessary. The first three positions of entered ZIP codes are validated for the correct state. Press COMMIT before exiting this form to save the new customer address. The next sequential address number for the customer ID is associated with the new address.

Emphasize that an address identical to an existing address within an ID cannot be added.

You cannot add a customer address identical to an existing customer address for this customer ID.

Mention that COMMIT must be pressed after DELETE RECORD.

To delete an existing customer address from the current customer ID, locate it with the function keys and press DELETE RECORD. Press COMMIT before exiting this form to save the deletion and archive the deleted address in the customer history section of the database.

Emphasize that when only one address exists for an ID it cannot be deleted.

You cannot delete an address when only one address exists within a customer ID.

!

WARNING:

Carefully verify that your cursor is on the customer address record you want to delete before pressing DELETE RECORD and COMMIT.

Review the Quirks subsection point by point and briefly summarize the use of the Maintain Customer File form.

Quirks and special data issues for CUST101F:

- When you add, change or delete a customer name or address within a customer ID using this form, you add, change or delete only the specified customer name or address, not the entire customer ID file. The System archives old changed and deleted data in the customer history section of the database. Customer history data is accessed through the Query Customer History Form (CUST104F) using the customer ID. Restoring archived information to the active customer database is difficult; carefully verify all changes and deletions before committing them.

- Customer names and addresses are not directly related to each other. They are indirectly related through their independent associations with the same customer ID. It is not necessary to associate the name and the address of a customer with the same name number and address number.

- This form is divided into three clear blocks of fields, and function keys associated with blocks can be used to easily move around the form.

- If you only know the name of the customer for whom you want to update information, press LOV in the Customer ID field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Add/Delete Customer Form.

- The Customer Name and Address blocks allow you to work with customer name and address records independently. Adding, changing or deleting a name or address effects only that record; all other name and address records remain unaffected.

- You may enter and execute queries in any one of the three blocks on this form. If you enter and execute queries in either the Customer Name or Address block, data are retrieved for only that block. You may update customer data (name or address) in that block only for the customer ID associated with the queried data. To execute a query, move to the appropriate block and press ENTER QUERY (in some instances, you may need to press this key twice to

clear the block's Customer ID field). Enter your query parameters, press EXECUTE QUERY, and make updates as needed.

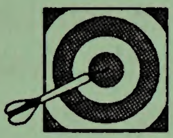
- Pressing DELETE RECORD alone does not delete a customer name or address; you must press COMMIT after pressing DELETE RECORD to truly delete customer data from the active customer database.
- Press COMMIT before exiting this form to save additions, changes and deletions of customer name and address data. Old changed and deleted names and addresses are archived in the customer history section of the database.
- If you attempt to add a customer name or address that is identical to an existing name or address within the customer ID, you receive error messages from the System.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise D-2 *(Maintain Customer File).*

FIND - Customer Form (CUST400F)

20 minutes



Note:
This form can also be found in Data Retrieval Functions. Customer Processing course participants should be familiar with its operation. Briefly review this form and its usefulness in customer processing tasks.

Review the purpose of the FIND - Customer form.

Review who uses this form and why.

Purpose and use of the FIND - Customer Form:

This form allows you to search for and view customer data and customer-related case data on-line. You may also access the On-line Case Abstract Form (CASE151F) directly from page 3 of this form.

FIND - Customer information includes: customer ID, name, name number, address, address number, serial numbers of cases containing a specified customer, and case/customer associations of specific names and addresses associated with each case.

BLM personnel responsible for retrieving customer and customer-related case data using a specific customer name or ID use this form to perform their task.

Review the navigation to this form (including QXFER).

Navigation to this form and use of CUST400F program name in QXFER:

The FIND - Customer Form (CUST400F) is an option on the Customer Processing Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu and then the FIND - Customer option from the Customer Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST400F program name.

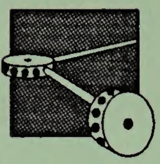
Discuss the data required to use this form, emphasizing the extensive query capabilities available.

Required Data you must have to use this form:

- Customer Name (or a portion of a name) and Customer Address (or some idea of the appropriate address)

NOTE:

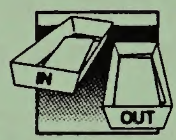
This form gives you a great deal of flexibility to query the database and retrieve customer and customer-related case data. An exact customer name and address is not necessary to use the form, and you do not need to know the customer ID. The more you know about the specific customer name and address you are interested in, however, the faster your FIND process will be.



Review this form's basic structure and the types of data that can be entered and retrieved on its various pages.

Structure of form:

The FIND - Customer Form consists of four pages. Page 1 allows you to query the System for customer names and display customer name and ID data. For the customer name/ID/name number combination selected on page 1, page 2 displays all the address data associated with the customer ID. For the customer ID/name number/address number selected on pages 1 and 2, page 3 displays all the case serial numbers, along with related case type and status data, containing the specified customer. The On-line Case Abstract Form can only be accessed from page 3. Page 4 displays detailed case-customer data for the serial number(s) displayed on page 3.



Review and demonstrate the step-by-step workflow for the FIND - Customer form.

Use the available training aids as needed.

Workflow within this form and a review of the form's pages and fields:

NOTE:

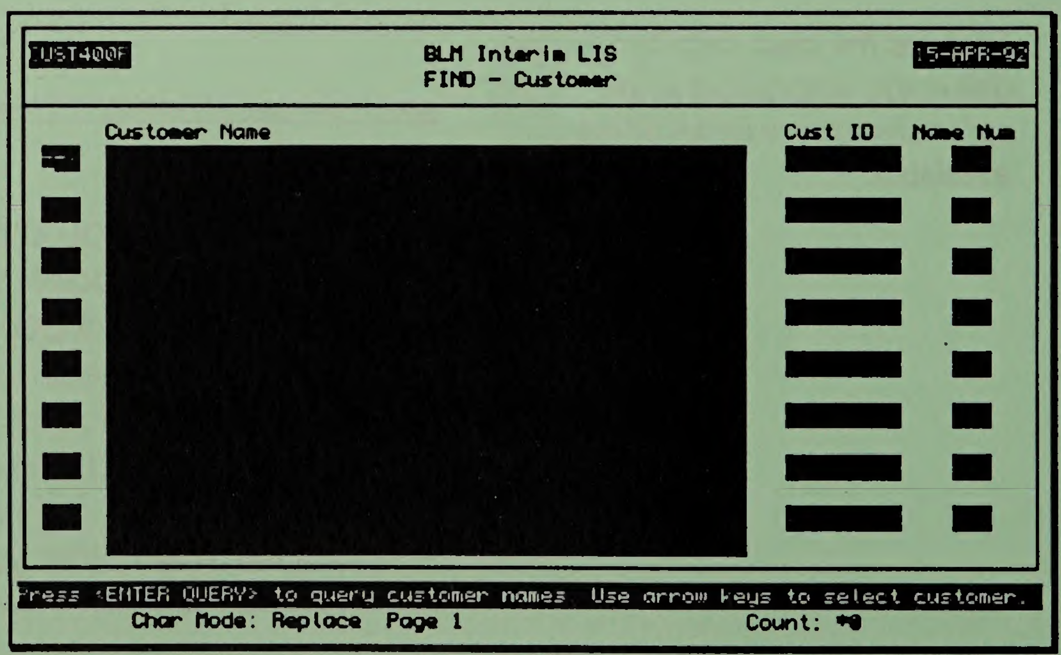
To retrieve a list of cases containing a customer for whom you already know the customer ID, name (or name number) and address (or address number), continue directly to page 3 of this form by pressing NEXT BLOCK or NEXT FIELD.

STEP 1

Page 1 allows you to enter customer name selection criteria and execute a query to retrieve customer data. To enter query selection criteria, press ENTER QUERY.

Mention the option of moving directly to page three if customer data are known.

Demonstrate and discuss entering and executing a query to find a customer name.



Demonstrate the use of the optional query wildcard character.

You can specify the customer name, ID or name number as selection criteria. Enter your query parameters in the appropriate fields. Because you can use the query wildcard character %, you do not need to know the full name of the customer for which you are searching Press EXECUTE QUERY to query the System for customers that match your selection criteria.

The System retrieves all of the customer names, as well as their associated customer ID's and name numbers, that meet the query criteria entered. Scroll through the retrieved names using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, and move the pointing arrow on the left of the page up and down.

Mention that all name numbers for retrieved ID's may not appear on this page.

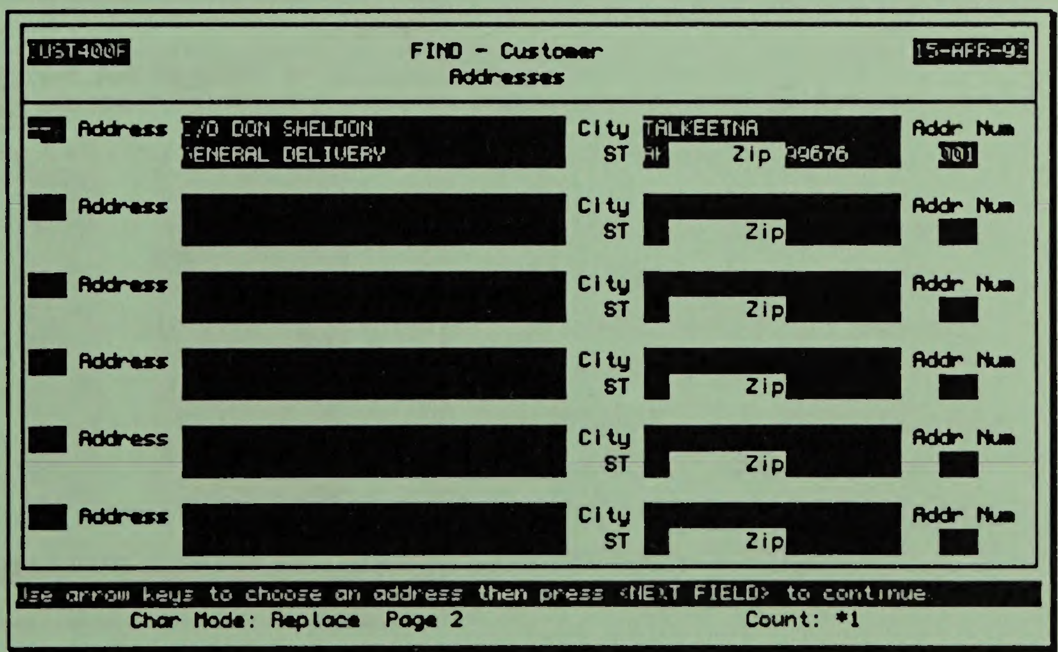
NOTE:

When you query by customer name, all name numbers for the retrieved customer ID(s) may not appear on this page.

When you move the arrow to the appropriate customer name, press NEXT FIELD to move to page 2 and retrieve all the addresses associated with this name's customer ID.

STEP 2

Page 2 displays the address(es) and address number(s) associated with the customer ID selected on page 1.



Review how one ID can contain multiple names and addresses and how these names and addresses are not directly tied to each other.

NOTE:

The System links the customer name and customer address to the customer ID independently of one another, allowing different combinations of names and addresses with the same ID in different cases.

If more than one address is retrieved, scroll through these using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET, and to move the pointing arrow on the left of the page up and down. When you locate the appropriate address, press NEXT FIELD to move to page 3 and obtain a list of case serial numbers associated with the selected customer ID/name number/address number combination.

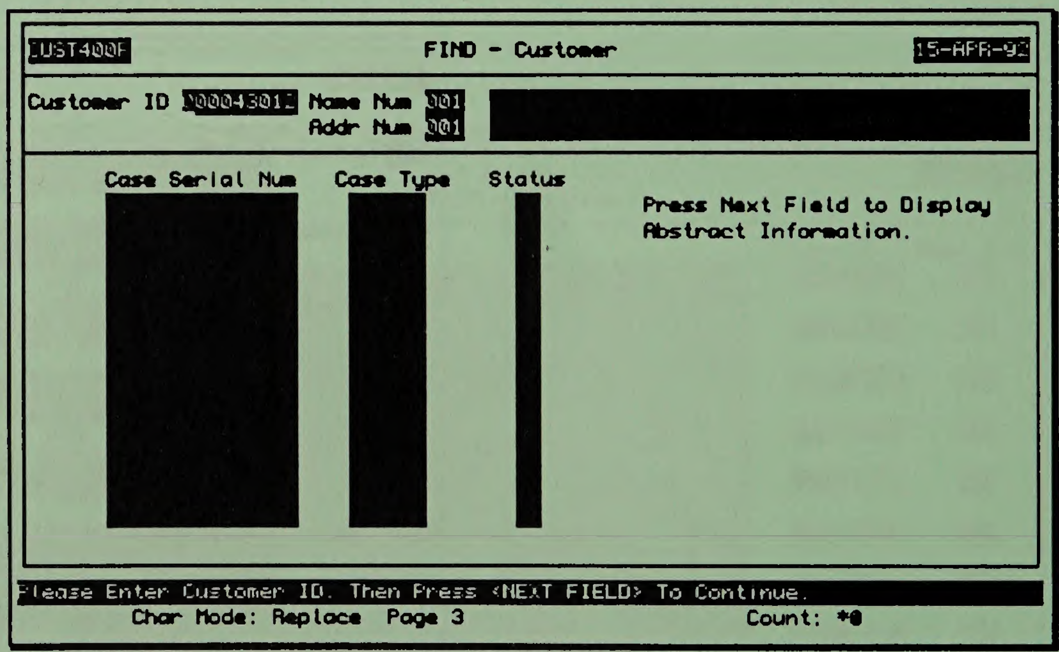
Demonstrate entering and executing a query to find a customer address within the selected ID.

You may enter and execute queries, based on parameters entered on this page, to selectively display a subset of the addresses associated with the customer ID selected on page 1. Only do this if the number of retrieved addresses is excessive, prohibiting scrolling.

If you want to return to page 1 to select a different customer name or enter another name query, press PREVIOUS FIELD or PREVIOUS BLOCK.

STEP 3

Use page 3 to retrieve a list of case serial numbers containing a specified customer ID/name number/address number combination.



Review the structure, purpose and use of page 3.

This page is divided into two blocks of fields. The upper block displays customer ID, name number and address number information. If you selected a name and address on pages 1 and 2, these are carried forward to page 3, as well as the appropriate customer ID. If no customer ID, name number and address number appear in the upper block, or if you want to replace previously selected values, enter the desired values in the appropriate fields. If the Name Number and/or Address Number fields are left blank (use CLEAR FIELD, if needed), all names and/or addresses within the specified customer ID are used as search criteria for the retrieval of case serial numbers.

Mention that leaving the Name and Address fields blank retrieves cases for all names and addresses within the ID.

The lower block on this page displays the serial numbers of cases containing the customer specified by the customer ID, name number and address number combination displayed in the upper block of fields. Before displaying case data, the System prints a message at the bottom of the page indicating how many case serial numbers exist for the customer. If the number of cases retrieved is zero, no case in the database contains the specified customer ID/name number and address number combination. In addition to case serial numbers, the System retrieves and displays associated case type and case status data in the lower block of fields. Scroll through the retrieved cases using NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET. You may not edit or update data in the lower section of the form.

Describe entering and executing a query to display a subset of retrieved cases.

You may enter and execute queries, based on parameters entered in the case serial number, case type and case status fields, to selectively display a subset of the cases containing the specified customer ID/name number/address number combination.

Discuss accessing and returning from the On-line Case Abstract form.

If you locate a case serial number for which you want to view additional information, you may access the On-line Case Abstract Form (CASE151F) by moving the cursor to that serial number and pressing NEXT FIELD. The System carries forward the selected case serial number onto the On-line Case Abstract Retrieval Options page. When you exit the On-line Case Abstract Form, you automatically return to page 3 of the FIND - Customer Form.

Review how to access page 4 and how to return to previous pages.

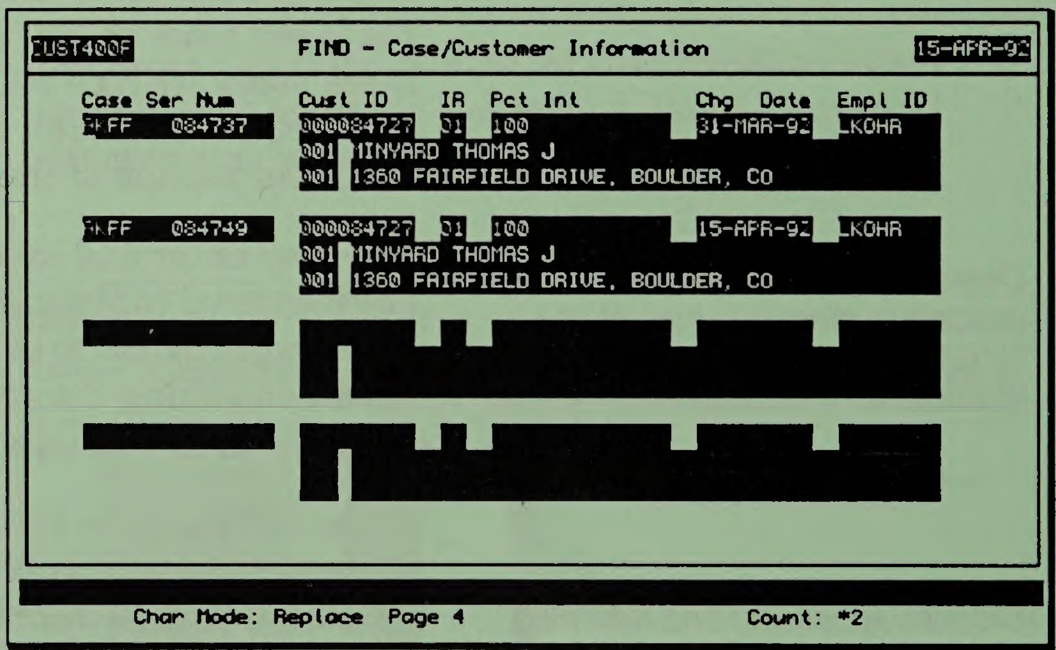
Press NEXT BLOCK to access page 4 of the FIND - Customer Form and view detailed customer information on the specified customer ID/name number/address number combination within each of the cases listed on page 3.

NOTE:
To move back and forth among the pages of this form, use NEXT/PREVIOUS BLOCK.

STEP 4

Briefly review the data elements on page 4.

Page 4 of this form displays detailed information concerning the specified customer ID/name number/address number combination for the cases listed on page 3. Cases are listed in the same order as on page 3. The following case-customer data is displayed on page 4 for each case: serial number, customer ID, interest relationship, percent interest, change date (i.e., the last date this customer's data within the case was updated), employee ID (i.e., the employee who made the update), name, name number, address and address number.


```
CUST400F          FIND - Case/Customer Information          15-APR-92

Case Ser Num      Cust ID     IR  Pct Int       Chg Date   Empl ID
KFF    084737     000084727   01  100           31-MAR-92  LKOHR
                  001 MINYARD THOMAS J
                  001 1360 FAIRFIELD DRIVE, BOULDER, CO

KFF    084749     000084727   01  100           15-APR-92  LKOHR
                  001 MINYARD THOMAS J
                  001 1360 FAIRFIELD DRIVE, BOULDER, CO

Char Mode: Replace  Page 4                      Count: *2
```

This page displays information for four cases simultaneously. If more than four serial numbers appeared on page 3, use NEXT/PREVIOUS RECORD and NEXT/PREVIOUS SET to scroll to the additional cases.

Describe entering and executing queries on page 4.

You may enter and execute queries using parameters entered in all the fields on this page (except the Customer ID, Name and Address fields) to search the database for additional case-customer information for the specified customer ID.

To return to page 3, press PREVIOUS FIELD or PREVIOUS BLOCK. To return to page 1, press NEXT BLOCK.

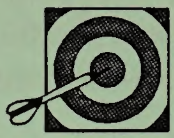
Quirks and special data issues for CUST400F:

Review the Quirks subsection point by point and briefly summarize the use of the FIND - Customer form.

- This form gives you a great deal of flexibility to query the database and retrieve customer and customer-related case data. An exact customer name and address is not necessary to use the form, and you do not need to know the customer ID. The more you know about the specific customer name and address you are interested in, however, the faster your FIND process will be.
- Page 1 of this form requires you to enter and execute a query to retrieve customer name and ID information. Once you have entered a customer name/ID query on page 1, no other specific queries are necessary for using the form. You can, however, enter and execute queries on all four pages of the form.
- The System links a customer name and a customer address to a customer ID independently of one another, allowing different combinations of names and addresses within the same customer ID in different cases, as needed.
- Move back and forth among the pages of this form by using NEXT/PREVIOUS BLOCK.
- This form allows you to access the On-line Case Abstract Form (CASE151F) directly from any case serial number displayed on page 3 and retrieve all the case information for a case serial number containing the customer specified on page 3.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Query Customer History Form (CUST104F)



20 minutes
(Including Exercise D-3)

Review the purpose of the Query Customer History form, emphasizing its unique access to archived customer data.

Review who uses this form and why.

Purpose and use of the Query Customer History Form:

This form allows you to query the customer history section of the Interim System database for old, archived customer information. Whenever a change or deletion is made to customer data using the Maintain Customer Form (e.g., change of address, correct the spelling of a name, delete an old address), the old information is archived in the customer history section of the System. This form is strictly for retrieving and viewing archived customer data; you may not add, change or delete information with this form.

BLM personnel responsible for retrieving and researching historical (archived) customer information use this form to perform their tasks.

Review the navigation to this form (including QXFER).

Navigation to this form and use of CUST104F program name in QXFER:

The Query Customer History Form (CUST104F) is an option on the Customer Processing Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu and then the Query Customer History option from the Customer Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST104F program name.

Discuss the data required to use this form.

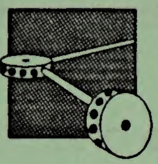
Required Data you must have to use this form:

- You may query archived customer information using customer ID, name or address data as selection criteria. Although no specific data are required on this form, you must have some information concerning the archived customer data to enter as selection criteria.

Emphasize that selection criteria can be entered in only one of the two lower blocks on the form.

Note:

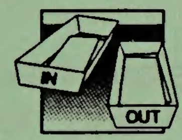
You may enter selection criteria in only one of the two lower blocks on this form (the Customer Name block or the Customer Address block) at a time. A single query cannot be based on data entered in both blocks simultaneously.



Review this form's basic structure and the types of data that can be entered and retrieved.

Structure of the form:

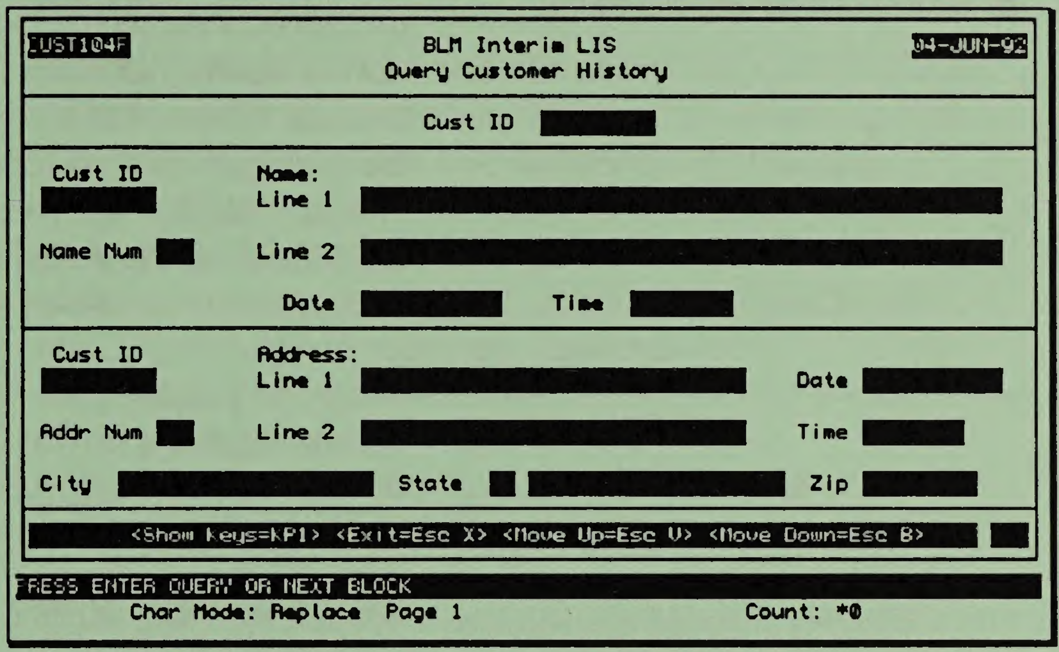
The Query Customer History Form consists of a single page divided into three separate blocks containing fields specifically related to information in the customer history section of the Interim System database.



Review and demonstrate the step-by-step workflow for the Query Customer History form.

Use the available training aids as needed.

Work flow within this form and a review of the form's fields:



Emphasize that this form retrieves archived data and that ENTER/EXECUTE QUERY are important in using the form.

NOTE:

To retrieve and view archived customer information on this form, you usually must use ENTER QUERY and EXECUTE QUERY. To move back and forth between the Customer Name and Address blocks, use NEXT/PREVIOUS BLOCK.

STEP 1

The top block of this form only contains an inaccessible Customer ID field that displays the customer ID associated with information appearing on the form.

Emphasize that, for any one query, selection criteria can be entered in only one block of the form.

You may query the customer history section of the database from either one of the two lower blocks on this form. For any one query, however, you can enter selection criteria in only one block.

Thoroughly discuss the relationships among customer ID, names and addresses in the customer history section of the database. Carefully explain why an ID may have an archived name but no address (and vice versa) as well as several names or addresses having the same number.

NOTE:

Archived customer name and address data are not directly related to each other. They are indirectly related through their independent associations with the same customer ID.

A customer ID may have archived address(es), but no archived name(s), and vice versa. It is also possible for a customer ID to have multiple archived name (or address) records having the same name number (or address number). This occurs when more than one change takes place for a single record (e.g., when a customer moves twice and the same address record (`001`) is updated twice to reflect the address changes).

When you enter this form, all fields are blank, the cursor appears in the Customer ID field of the Customer Name block, and the following message appears on the message line:

```
PRESS ENTER QUERY OR NEXT BLOCK
```

You must decide which type of selection criteria (customer name, address or ID) you want to use to query the database. Go to Step 2 if you want to use customer name data, Step 3 if you want to use customer address data, and Step 4 if you want to use a customer ID number.

STEP 2

If you want to enter a name as the selection criteria, press ENTER QUERY. The cursor remains in the Customer ID field of the Customer Name block. Use NEXT FIELD to move to the Line 1 and Line 2 fields, enter the appropriate name data, and press EXECUTE QUERY. Use the wildcard character, %, if needed.

Demonstrate and discuss entering and executing a query (including the use of the optional wildcard character) to retrieve archived customer data.

The System retrieves all archived customer name records meeting the specified name criteria, even if they have different customer ID numbers. The lowest numbered customer ID/name number record is displayed first, along with the lowest numbered archived address record (if any) for this ID. Use NEXT/PREVIOUS RECORD to scroll through multiple name

records; note that the values in the Customer ID and Address blocks change if the customer ID number in the Customer Name block changes.

Mention accessing the customer address block once customer name data are retrieved.

For any customer ID displayed, you can scroll through its archived addresses (if any) by pressing NEXT BLOCK and using the NEXT/PREVIOUS RECORD keys.

Emphasize that only archived names meeting the selection criteria are retrieved (not necessarily all of the archived names within a displayed ID). Also mention that all archived addresses for a displayed ID can be scrolled through.

NOTE:
When customer name data are used as selection criteria, customer name records not meeting the specified criteria are not retrieved. If multiple names have been archived for a customer ID, only those records meeting the name selection criteria are viewable, but all archived address records for the ID can be viewed.

STEP 3

Demonstrate and discuss entering and executing a query (including the use of the optional wildcard character) to retrieve archived customer address data.

If you want to enter a customer address as the selection criteria, press NEXT BLOCK and move to the Customer Address block. The cursor moves to the Customer ID field of the Address block. Press EXECUTE QUERY, and use NEXT FIELD to move to the Line 1 and Line 2 fields, as well as the City, State and Zip fields, if needed. Enter the appropriate address data, and press EXECUTE QUERY. Use the wildcard character, %, if necessary.

The System retrieves all archived customer address records meeting the specified address criteria, even if they have different customer ID numbers. The lowest numbered customer ID/address number record is displayed first, along with the lowest numbered archived name record (if any) for this ID. Use NEXT/PREVIOUS RECORD to scroll through multiple address records; note that the values in the Customer ID and Name blocks change if the customer ID number in the Customer Address block changes.

Mention accessing the customer name block once customer address data are retrieved.

For any customer ID displayed, you can scroll through its archived names (if any) by pressing PREVIOUS BLOCK and using the NEXT/PREVIOUS RECORD keys.

Emphasize that only archived addresses meeting the selection criteria are retrieved (not necessarily all the archived addresses within a displayed ID). Also mention that all archived names for a displayed ID can be scrolled through.

NOTE:
When customer address data are used as selection criteria, customer address records not meeting the specified criteria are not retrieved. If multiple addresses have been archived for a customer ID, only those records meeting the address selection criteria are viewable, but all archived name records for the ID can be viewed.

STEP 4

Discuss using a customer ID as the selection criteria. Mention that the customer information screen is not available with LOV in customer ID fields.

If you want to enter a customer ID as the selection criteria, you do not need to press EXECUTE QUERY. Enter the customer ID in the Customer ID field of either the Customer Name block or Customer Address block and press NEXT FIELD. There is no List of Values (LOV) Customer Information screen available to help you find a customer ID. Use the FIND - Customer Form (CUST400F) or the query procedures outlined in Steps 2 and 3 of this workflow if you need to search for a customer ID.

All archived customer name and address records for the specified customer ID are retrieved. The lowest numbered archived name and address records are displayed in their respective blocks. Use the appropriate function keys to scroll through multiple name and address records.

Emphasize that, before specifying different selection criteria, ENTER QUERY must be pressed.

NOTE:
Once you have executed a query on this form, you must press ENTER QUERY before specifying other selection criteria (including a customer ID) for another database query.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions,

Quirks and special data issues for CUST104F:

- Whenever a change or deletion is made to customer data using the Maintain Customer Form (e.g., change of address, correct the spelling of a name, delete an old address), the old information is archived in the customer history section of the System. The Query Customer History Form is strictly for retrieving and viewing archived customer data; you may not add, change or delete information with this form.

- Although no specific data are required on this form, you must have some information concerning an archived customer (e.g., customer ID, name or address data) to enter as selection criteria.

- You may enter selection criteria in only one of the two lower blocks on this form (the Customer Name block or the Customer Address block) at a time. A single query cannot be based on data entered in both blocks simultaneously.

- To retrieve and view archived customer information on this form, you usually must use ENTER QUERY and EXECUTE QUERY. To move back and forth between the Customer Name and Address blocks, use NEXT/PREVIOUS BLOCK.

- The top block of this form only contains an inaccessible Customer ID field that displays the customer ID associated with information appearing on the form.

- A customer ID may have archived address(es), but no archived name(s), and vice versa. It is also possible for a customer ID to have multiple archived name (or address) records having the same name number (or address number).

- When you enter this form, you must decide which type of selection criteria (customer name, address or ID) you want to use to query the database. If you want to use a customer ID, enter it in the Customer ID field in either the Customer Name or Address block and press NEXT FIELD. If you want to use customer name or address data, move to the appropriate block, press ENTER QUERY, enter your query parameter and press EXECUTE QUERY.

- This form displays one customer name number and address number at a time. To access and scroll through multiple names or addresses, use NEXT/PREVIOUS BLOCK and NEXT/PREVIOUS RECORD. When customer name or address data are used as selection criteria, records not meeting the specified criteria are not retrieved. If multiple customer records of one type (names or addresses) have been archived for a customer ID, only those records meeting the specified criteria are viewable, but all archived records of the other type for the ID can be viewed.

- There is no List of Values (LOV) Customer Information screen available to help you find a customer ID. Use the FIND - Customer Form (CUST400F) or the query procedures outlined in this form's workflow if you need to search for a customer ID.

- As you scroll through customer names, customer addresses do not scroll automatically. The form only displays the first address number for each customer ID while you scroll through the names. The reverse happens when you scroll through customer addresses.

- Once you have executed a query on this form, you must press ENTER QUERY before specifying other selection criteria (including a customer ID) for another database query.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions,

***Go to Exercise D-3** (Query Customer History).*

Customer Processing Reports Menu

5 minutes

Discuss navigation to the Customer Processing Reports menu.

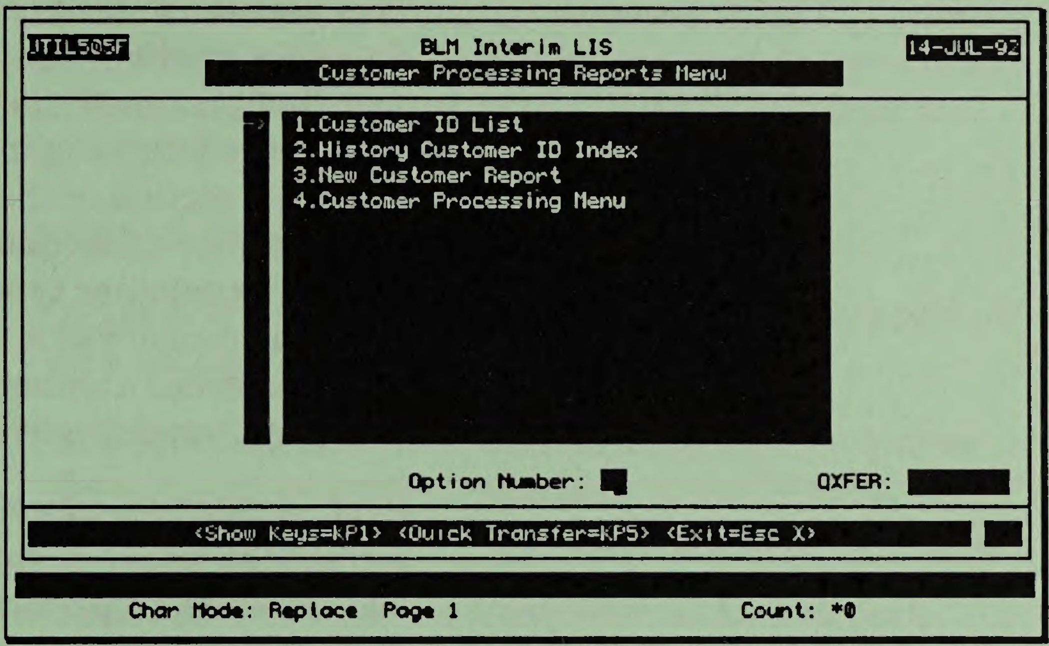
Review the general purpose of each menu option.

Refer to the Customer Processing Portion of the System Map.

Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions,

Through the Customer Processing Reports Menu, you may access forms that allow you to generate reports concerning Interim System customer database information. There are three available forms on the Customer Processing Reports Menu used to enter selection criteria for report requests:



Note:

The Customer Processing Menu option returns you to the menu one level higher in the system from which you can access other options in Customer Processing.

Customer ID List Report Form (CUST200F)

15 minutes

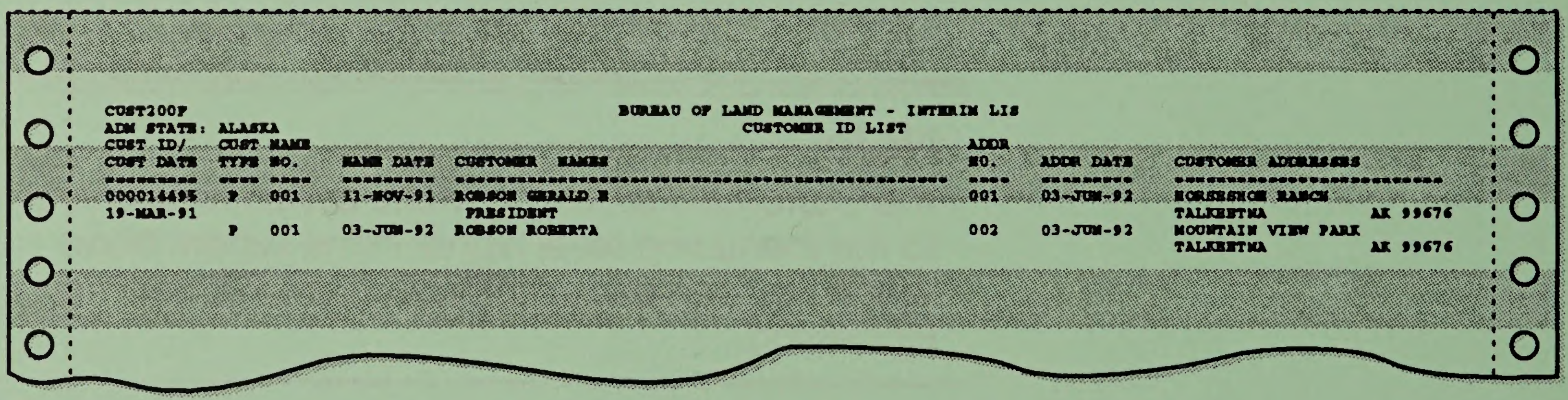
Review the purpose of the Customer ID List Report form, as well as its output.

Purpose and use of Customer ID List Report Form:

The Customer ID List Report Form (CUST200F) allows you enter selection criteria for generating a Customer ID List Report. This 132-column off-line report lists active customer data for a specified customer ID, customers added to the System during a specific time period, or all customers in the System. This report's output can be written to a file in your directory on the Prime computer or printed on a specified printer. For each customer included in the report, the following information from the active customer section of the database is output: customer ID, customer date (date the customer was added to the System), customer type, name number, name date (date the name was added or changed), customer name, address number, address date (date the address was added or changed), and customer address.

Review who uses this form and why.

BLM personnel responsible for generating reports containing active customer information in the System use this form to perform their tasks.



```
CUST200F                                   BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM STATE: ALASKA                                     CUSTOMER ID LIST
CUST ID/   CUST NAME                                                              ADDR
CUST DATE  TYPE NO.   NAME DATE  CUSTOMER  NAMES                                  NO.   ADDR DATE   CUSTOMER ADDRESSES
---------  ---- ----  ---------  ---------------------------------------------    ----  ---------   ----------------------------
000014495   P   001   11-NOV-91  ROBSON GERALD E                                  001   03-JUN-92   HORSESHOE RANCH
19-MAR-91                          PRESIDENT                                                        TALKEETNA          AK 99676
            P   001   03-JUN-92  ROBSON ROBERTA                                   002   03-JUN-92   MOUNTAIN VIEW PARK
                                                                                                    TALKEETNA          AK 99676
```

Warn students about the size of a full customer list report and the impact it can have on System performance.

WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.

Review the navigation to this form (including QXFER).

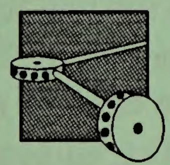
Navigation to this form and use of CUST200F program name in QXFER:

The Customer ID List Report Form (CUST200F) is an option on the Customer Processing Reports Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu, then the Customer Processing Reports Menu option from the Customer Processing Menu, and finally the Customer ID List option from the Customer Processing Reports Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST200F program name.

Discuss the data required to use this form.

Required Data you must have to use this form:

- A specific Customer ID (only required for a report on one specific ID).
- A Beginning Date and Ending Date (only required for a report on customers added to the System during the time period specified by the date range).
- A decision to have the Customer ID List Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's basic structure and the types of data that can be entered.

Structure of the form:

The Customer ID List Report Form consists of a single page containing fields specifically related to the selection criteria required for generating a Customer ID List Report.

Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Customer ID List Report form.

Use the available training aids as needed.

```
CUST200F                     BLM Interim LIS                        04-JUN-92
                         Customer ID List Report

                   opt -->    Customer ID Number:

                              Beginning Date: 04-JUN-1992
                   opt -->
                                 Ending Date: 04-JUN-1992

                   Destination P PRO         Queue Type P

          <Show Keys=KP1> <Submit Report=KP0> <Exit=Esc X>              LOV
Please enter the Customer ID Number.  Blank = ALL ID NUMBERS.
      Char Mode: Replace  Page 1                        Count: *0
```

STEP 1

You may generate a Customer ID List Report containing active customer data for a single customer ID, customers added to the System during a specified time period, or for all customers in the active customer section of the database.

Emphasize that this report can contain data for one customer, for customers added to the System during a specified time period or for all the customers in the active section of the database.

Discuss and demonstrate using the customer information screen, including entering and executing a query using the optional wildcard character.

To generate this report for a single customer ID, enter the appropriate number in the optional Customer ID Number field. If you know the name, but not the customer ID, of the customer for this report, press LOV in the Customer ID Number field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Customer ID List Report Form. Move to the Customer Name field, enter the name as it would be stored in the database, and press EXECUTE QUERY. Use the wildcard character, %, in the name, if necessary. The System retrieves all names in the database that match the name entered, and you may scroll through them one at a time using NEXT/PREVIOUS RECORD. When you locate the customer for this report, press NEXT FIELD and return the customer ID to the Customer ID List Report Form.

When you press NEXT FIELD with a valid number in the Customer ID field, the Beginning and Ending Date fields are cleared, and the cursor skips to the first Destination field.

Warn students that, if a customer ID is not specified, the report will contain multiple customers.

NOTE:

If you do not enter a specific customer ID, this report will contain data on multiple customers. Multiple customer reports contain current data regarding either all customers in the System or those added between the dates specified in the Beginning and Ending fields on this form. Reports containing information on multiple customers can be very large and can slow Interim System response times.

To generate a this report for customers added to the System during a specified time period or for all customers in the active customer section of the database, leave the Customer ID Number field blank and move to the Beginning Date field.

STEP 2

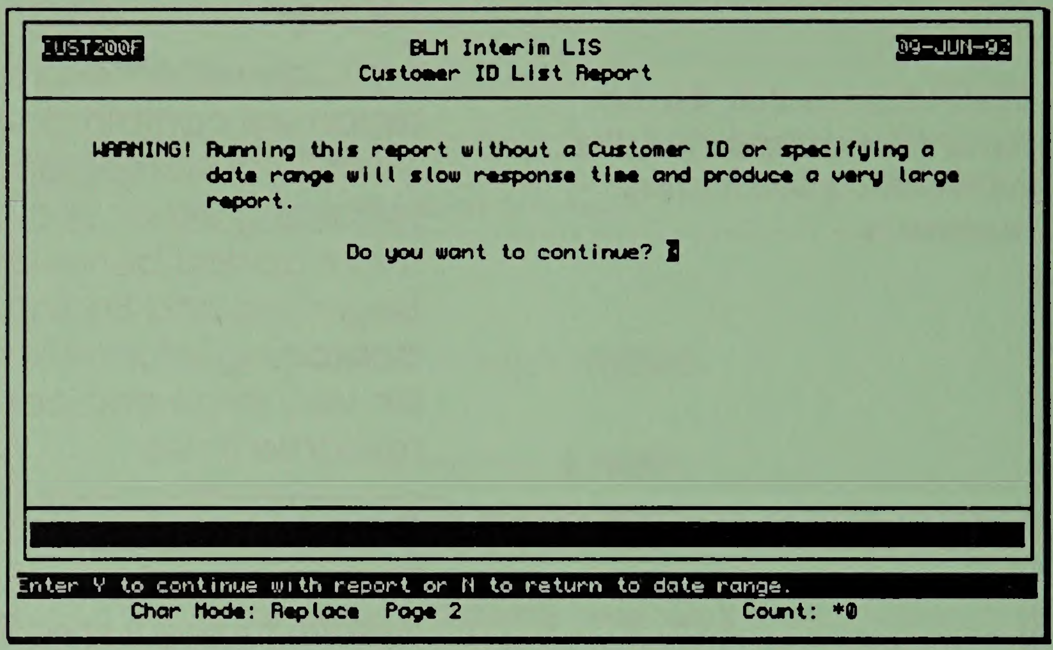
The optional Beginning and Ending Date fields are used to specify the date range for a Customer ID List Report containing active customer data for customers added to the System during the specified time period. Both fields default to today's date.

Discuss how to request a report listing customers added to the System during a specific time period.

To generate this report for customers added to the System during a specified time period, either accept or replace the defaults in the Beginning Date and Ending Date fields. You may not enter a date in just one of these fields; either enter both dates, or leave both fields blank. If dates are entered, the ending date cannot be earlier than the ending date.

Demonstrate how page 2 of the form is accessed if the Customer ID, Beginning Date and Ending Date fields are left blank.

If you leave the Beginning and Ending Date fields blank, and did not enter a single customer ID, you are selecting a report containing active data on all customers in the System. When you press NEXT FIELD in the blank Ending Date field, the cursor moves to page 2.



Discuss why a warning page is included in this form.

Page 2 of this form warns you that a Customer ID List Report for all customers in the System is extremely large and will slow down Interim System response times if run during business hours.

Enter a `Y` or `N` to answer the question, `Do you want to continue?` If you enter a `Y`, the cursor moves to the first destination field at the bottom of page 1. If you enter an `N`, the cursor returns to the Beginning Date field on page 1 so that you can enter a date range.

STEP 3

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a `P` or an `F` in the first Destination field; the letter `P` indicates that you want a 132-column printout of the report, and the letter `F` indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the Customer ID List Report Form generates a 132-column printout, and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

!

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express Queue.

If you send the Customer ID List Report to the Express queue, you may receive a message similar to the following on your terminal:

```
***BATCH_SERVICE (user78 on ZEUS) at 15:07

Job CUST200R.180934.CPL for RUREADI
(#20941) completed
```

This message indicates that the Customer ID List Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System

screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for CUST200F:

Review the Quirks subsection point by point and briefly summarize the use of the Customer ID List Report form.

- Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.
- You may generate a Customer ID List Report containing active customer data for a single customer ID, customers added to the System during a specified time period, or for all customers in the active customer section of the database.
- Enter a single customer ID number only if you want a Customer ID List Report containing information regarding that individual customer ID.
- If you know the name, but not the customer ID, of the customer for this report, press LOV in the Customer ID Number field and access the Customer Information screen (DICT138F). This screen allows you to search for the correct customer ID and automatically return it to the Customer ID List Report Form.
- To specify a report containing information on customers added to the System during a specific time period, leave the Customer ID Number field blank and enter the appropriate beginning and ending dates.
- If you do not specify a customer ID or a date range, you automatically access page 2. This page simply serves to warn you that a Customer ID List Report for all customers in the System is extremely large and will slow down Interim System response times if run during business hours.
- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is

waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

History Customer ID Index Report Form (CUST201F)

10 minutes

Review the purpose of the History Customer ID Index Report form, as well as its output.

Purpose and use of History Customer ID Index Report Form:

The History Customer ID Index Report Form (CUST201F) allows you to enter selection criteria for generating a History Customer ID Index Report. This 132-column off-line report lists archived customer information from the customer history section of the System for a specific customer ID or for all customers in the System. This report's output can be written to a file in your directory on the Prime computer or printed on a specified printer., and may be generated as a file in your directory on the Prime computer or printed on a specified printer. For each customer included in the report, the following information from the customer history section of the database is output: customer ID, customer date (date the customer was added to the System), customer type, name number, name date (date the name was added or changed), customer name, address number, address date (date the address was added or changed), and customer address.

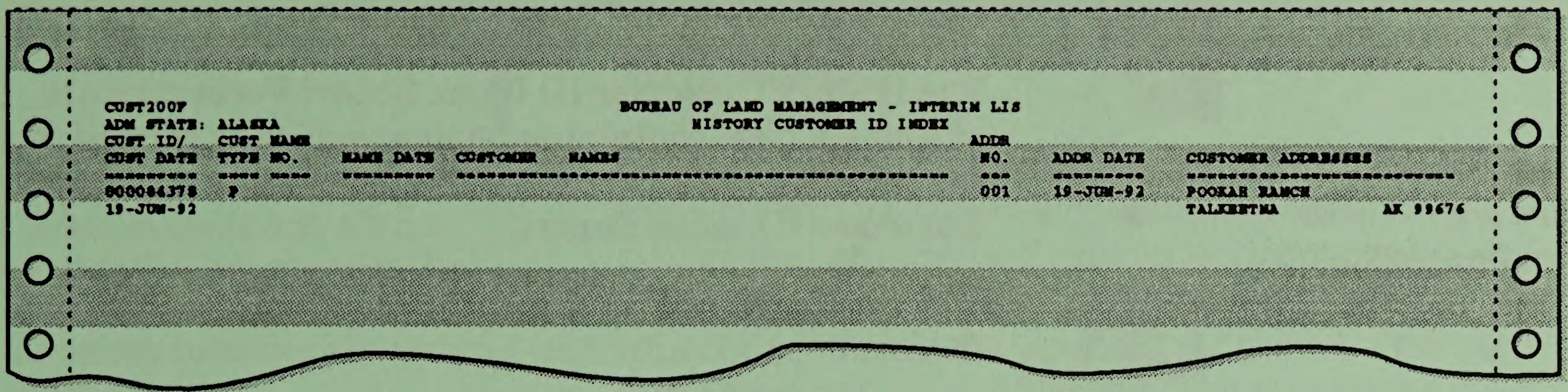
Review who uses this form and why.

BLM personnel responsible for generating reports containing archived customer information from the System's customer history section use this form to perform their tasks.

Discuss archived customer data. Explain why some ID's have no archived data, others only archived names or addresses. Explain how an ID can have multiple names or addresses with the same number.

Note:

This report only contains information found in the customer history section of the System; current names and addresses do not appear on the report. Some customer ID's have no archived data. Other customer ID's have archived address(es), but no archived name(s), and vice versa. It is also possible for a customer ID to have multiple archived name (or address) records having the same name number (or address number). This occurs when more than one change takes place for a single record (e.g., when a customer moves twice and the same address record (`001`) is updated twice to reflect the address changes).



```
CUST200F                                   BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM STATE: ALASKA                             HISTORY CUSTOMER ID INDEX
CUST ID/   CUST NAME                                                            ADDR
CUST DATE  TYPE NO.    NAME DATE  CUSTOMER   NAMES                              NO.    ADDR DATE    CUSTOMER ADDRESSES
---------  ---- ----   ---------  ----------------------------------------     ---    ---------    -------------------------
000084378   P                                                                   001    19-JUN-92    POOKAH RANCH
19-JUN-92                                                                                           TALKEETNA            AK 99676
```

WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.

Warn students about the size of a full history index report and the impact it can have on System performance.

Navigation to this form and use of CUST201F program name in QXFER:

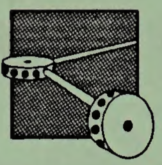
The History Customer ID Index Report Form (CUST201F) is the an on the Customer Processing Reports Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu, then the Customer Processing Reports Menu option from the Customer Processing Menu, and finally the History Customer ID Index option from the Customer Processing Reports Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST201F program name.

Review the navigation to this form (including QXFER).

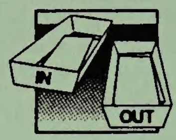
Required Data you must have to use this form:

- A specific Customer ID (only required for a report on one specific ID).
- A decision to have the History Customer ID Index Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.

Discuss the data required to use this form.



Review this form's basic structure and the types of data that can be entered.



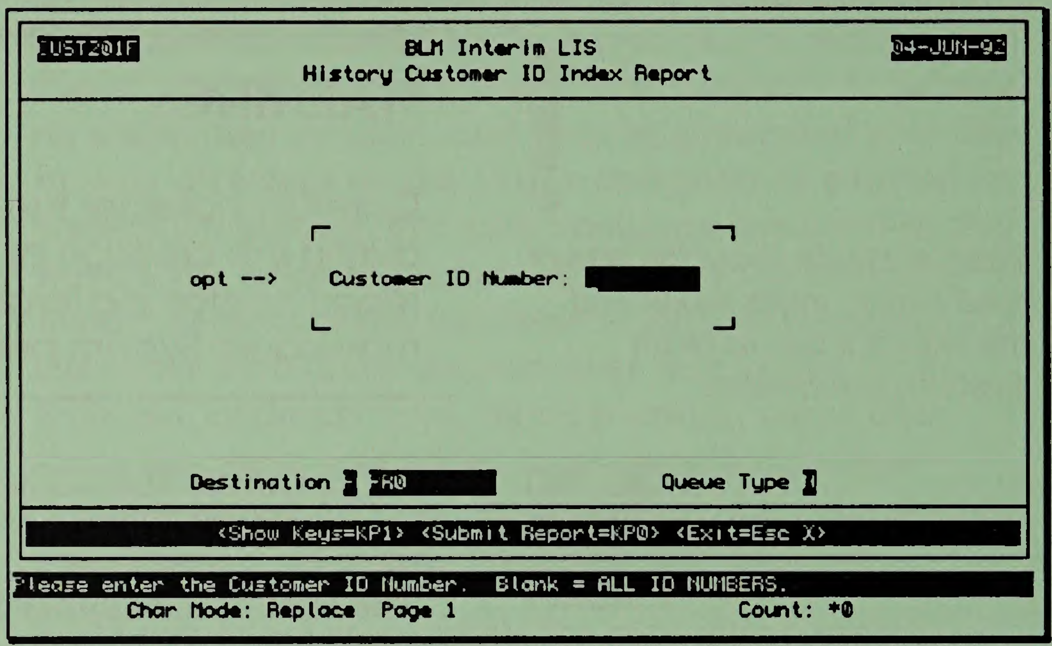
Structure of the form:

The History Customer ID Index Report Form consists of a single page containing fields specifically related to the selection criteria required for generating a History Customer ID Index Report.

Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the History Customer ID Index Report form.

Use the available training aids as needed.



STEP 1

You may generate a History Customer ID Index Report containing archived customer data for either a single customer ID or all customers having archived data in the System's customer history section. Your choice is simply one or all. You cannot generate a partial list report.

Emphasize that this report can contain customer data for one customer ID or for all customer ID's having data archived in the System.

To generate this report for a single customer ID, enter the appropriate number in the optional Customer ID Number field. The Customer Information screen is not available using LOV in the Customer ID field.

Mention that the customer information screen is not available – users must know the appropriate ID if they want this report for a single customer ID.

To generate a report listing archived customer name and address data associated with all customer ID's in the System, leave the Customer ID Number field blank.

Warn students that, if a customer ID is not specified, the report will contain all the archived customer information in the System.

WARNING:

If you do not enter a specific customer ID on this form, a History Customer ID Index Report containing all archived customer data in the System's customer history section is generated. A report containing this volume of data can be very large and can slow Interim System response times.

STEP 2

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a 132-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the History Customer ID Index Report Form generates a 132-column printout, and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:

A default printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

When you press COMMIT with **E** in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express Queue.

If you send the History Customer ID Index Report to the Express queue, you may receive a message similar to the following on your terminal:

```
***BATCH_SERVICE (user78 on ZEUS) at 15:07

Job CUST201R.201503.CPL for RUREADI
(#20992) completed
```

This message indicates that the History Customer ID Index Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press the REDISPLAY PAGE function key to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for CUST201F:

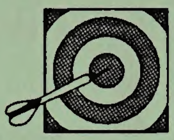
- Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.
- You may generate a History Customer ID Index Report containing archived customer data for a single customer ID or for all customers having archived data in the System's customer history section.

Review the Quirks subsection point by point and briefly summarize the use of the History Customer ID Index Report form.

- Enter a single customer ID number only if you want a History Customer ID Index Report containing archived information regarding that individual customer ID.
- If you do not enter a customer ID number, you are requesting automatically a History Customer ID Index Report containing all archived customer information in the System's customer history section. This can be a very large report and may slow down Interim System response times if run during business hours.
- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

New Customer Report Form (CUST202F)



Purpose and use of New Customer Report Form:

20 minutes
(Including Exercise D-4)

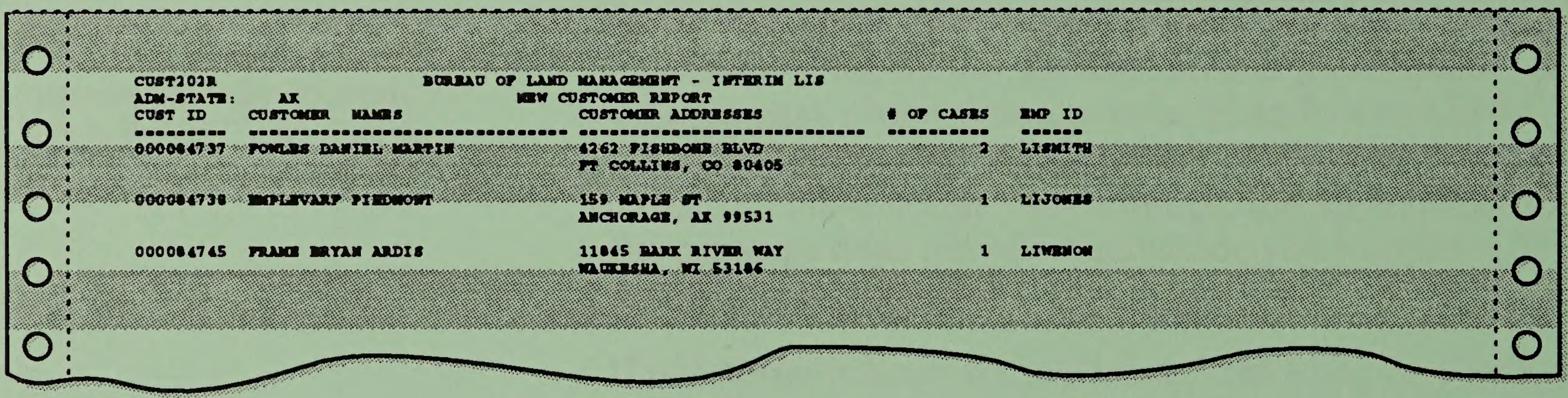
Review the purpose of the New Customer Report form.

Mention that in addition to customer ID, name and address data, this report lists the number of cases to which an ID is linked.

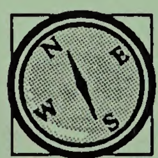
The New Customer Report Form (CUST202F) allows you enter selection criteria for generating a New Customer Report. This 132-column off-line report lists active customer data for customers added to the System during a specific time period, as well as the number of cases to which each customer is linked. This report's output can be written to a file in your directory on the Prime computer or printed on a specified printer. For each customer included in the report, the following information from the active customer section of the database is output: customer ID, customer names, customer addresses, number of cases in the System to which the customer ID is linked, and the employee initials of the BLM employee who added the customer to the System.

Review who uses this form and why.

BLM personnel responsible for generating reports containing customer information for customers added to the System during a specified time period use this form to perform their tasks.



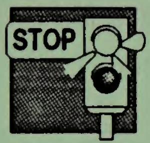
```
CUST202R                     BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:    AK                          NEW CUSTOMER REPORT
CUST ID    CUSTOMER  NAMES                  CUSTOMER ADDRESSES         # OF CASES  EMP ID
---------  ------------------------------  --------------------------  ----------  ------
000084737  FOWLES DANIEL MARTIN            4262 FISHBONE BLVD                   2  LISMITH
                                           FT COLLINS, CO 80405
000084738  EMPLEVARP PIEDMONT              159 MAPLE ST                         1  LIJONES
                                           ANCHORAGE, AK 99531
000084745  FRANK BRYAN ARDIS               11845 BARK RIVER WAY                 1  LIWENON
                                           WAUKESHA, WI 53186
```



Navigation to this form and use of CUST202F program name in QXFER:

Review the navigation to this form (including QXFER).

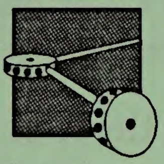
The New Customer Report Form (CUST202F) is an option on the Customer Processing Reports Menu. It is accessed by choosing the Customer Processing Menu option from the Interim System Main Menu, then the Customer Processing Reports Menu option from the Customer Processing Menu, and finally the New Customer Report option from the Customer Processing Reports Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CUST202F program name.



Discuss the data required to use this form.

Required Data you must have to use this form:

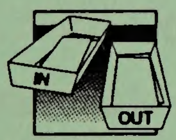
- A Beginning Date and Ending Date.
- A decision to have the New Customer Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's basic structure and the types of data that can be entered.

Structure of the form:

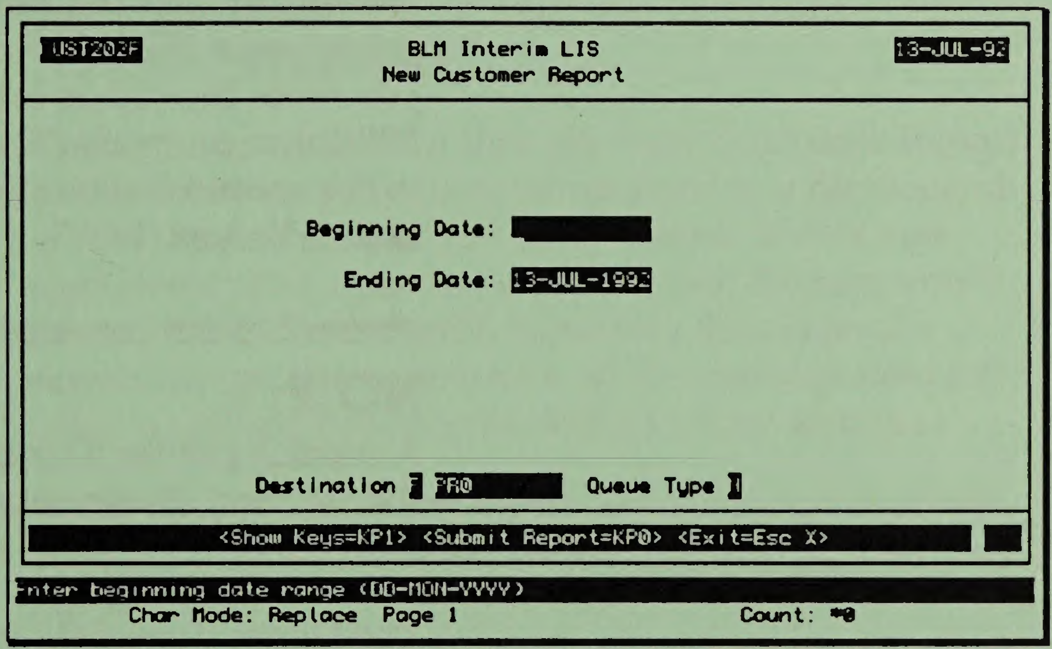
The New Customer Report Form consists of a single page containing fields specifically related to the selection criteria required for generating a New Customer Report.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the New Customer Report form.

Use the available training aids as needed.


UST202F | BLM Interim LIS | 13-JUL-92
New Customer Report

Beginning Date:

Ending Date: 13-JUL-1992

Destination PRO Queue Type

<Show Keys=KP1> <Submit Report=KP0> <Exit=Esc X>

nter beginning date range (DD-MON-YYYY)
Char Mode: Replace Page 1 Count: *0

STEP 1

The required Beginning and Ending Date fields specify the date range for a New Customer Report containing active customer data for customers added to the System during the specified time period. The Ending field defaults to today's date.

Emphasize that this report contains customer and case customer data for customers added to the System within a specified time period.

Enter the appropriate beginning date, and either accept or replace the default in the Ending Date field. The ending date cannot be earlier than the beginning date.

!

WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information (i.e., specifying large date ranges) may cause System performance to deteriorate.

Warn students about the size of this report if a large range is entered and the impact this can have on System performance.

STEP 2

The two Destination fields allow you to specify where and how you want this form's report created.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a 132-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Discuss the difference between sending off-line output to a printer and to a file.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the New Customer Report Form generates a 132-column printout, and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:

A default printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express Queue.

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the New Customer Report to the Express queue, you may receive a message similar to the following on your terminal:

```
***BATCH_SERVICE (user32 on ZEUS) at 13:37

Job CUST202R.214436.CPL for RUREADI
(#20531) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the New Customer Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for CUST202F:

Review the Quirks subsection point by point and briefly summarize the use of the New Customer Report form.

- In addition to basic customer ID, name and address data, this form lists the number of cases in the System to which a customer ID is linked.
- Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information (i.e., specifying a large date range) may cause System performance to deteriorate.

* When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise D-4** (Customer Processing Reports).*

30 minutes
(Course review and Summary, Questions, Close-out and Evaluations.)

Briefly review and summarize the material covered in the Customer Processing course.

Prompt for and answer questions.

Close out with the class and have each participant fill out an Instructor Evaluation form.

E

E. Legal Land Description Processing Training Guide

Instructor's Version
Includes Teaching Notes

The purpose of this course is...

- To teach students to perform legal land description processing functions using the Interim System forms. These functions include:
  - adding legal land description information to the Interim System database
  - changing legal land description information in the Interim System database
  - deleting legal land description information from the Interim System database
  - generating reports concerning legal land description data

1. The Interim System Legal Land Description Processing Course

1.1 Participants

10 Minutes
(Instructor Introductions, Purpose on p.1, Participants, Prerequisites and Questions)

The Interim System Legal Land Description Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for the entry, update and deletion of legal land description information in the Interim System database. This portion of the Interim System is restricted to a select number of BLM employees responsible for the maintenance of Interim System legal land description data. Only BLM employees responsible for either legal land description processing tasks or the support or supervision of such tasks should participate in this course.

Emphasize who should and should not be in this class.

Individuals participating in this course should fit clearly into at least one of the following personnel categories:

Ad-Hoc Data Query Personnel
This category of users develops ad-hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Legal Land Description Processing Personnel
This category of individuals maintains the Interim System legal land description (LLD) database. These individuals add, delete and update LLD information.

System Application Support & Maintenance Personnel
Individuals in this category maintain the operational status of the Prime computers and the Interim System software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

Emphasize that this course will make little sense to those who have not taken the prerequisite course.

• Exposure to and understanding of the information presented in the *Interim System Data Retrieval (BLM)* course.

Although the Interim System Legal Land Description Processing course will contain a brief review and question and answer session concerning the concepts, terms and access procedures (Prime and Interim System) taught in the prerequisite course, students should already be familiar with this material. Students should also be familiar with the purposes and use of Interim System forms in Report Processing and Data Retrieval Functions. Interim System Legal Land Description Processing trainers will assume that participants need only a quick warm-up before launching into new information. Students should review all the training materials they received in prerequisite courses before coming to class.

All Interim System Legal Land Description Processing course participants should be familiar with the following topics:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What types of data manipulations the Interim System can perform.
- Interim System database and Structured Query Language (SQL) concepts and terminology.
- How to access and navigate on the Prime.
- How to access the Interim System and use Interim System/Oracle® login procedures.
- Interim System security.
- Interim System structure, system map, and basic navigation in the menu-driven Interim System.
- Functional use of Interim System Report Processing and Data Retrieval Functions.

- Proper use of the forms in Report Processing and Data Retrieval Functions for the performance of all on-line and off-line data retrieval tasks in the Interim System database.

Prompt for and answer questions.

15 Minutes
(Ice Breaker, Housekeeping Rules and Attendance)

For an Ice Breaker, have students fill out name tags/ place cards and introduce themselves.

Review the Housekeeping Rules for the classroom.

Pass the Attendance Sign-In Sheet around the class.

2 . Purpose of Legal Land Description Processing Course

10 Minutes
(Purpose of this Course (re-state), What is Legal Land Description Processing?, Course Objectives, and Course Schedule)

Restate the Purpose of the Legal Land Description Processing Course.

To teach students to perform legal land description processing functions using the Interim System forms. These functions include: adding, changing or deleting legal land description information in the Interim System database and generating reports concerning legal land description data.

2.1 What is Legal Land Description Processing?

Explain what legal land description processing is in general, and briefly review the tasks that can be performed using the forms in this section of the System.

Explain that no current AALRS, C/R, ORCA or MC tasks correspond to Interim LLD processing tasks; these procedures are new to the BLM.

Refer to the System Map when reviewing LLD Processing tasks and forms.

This course uses the term legal land description processing to address the set of automated tasks that affect legal land description information and related land data stored in the LLD table of the Interim System database. Specifically, legal land description processing includes the following tasks:

- **Adding** new legal land descriptions and related land information to the Interim System database.
- **Updating** existing legal land descriptions and related land information in the Interim System database.
- **Deleting** legal land descriptions and related land information from the Interim System database.
- **Generating** reports concerning special survey information and non-standard survey information from the Interim System LLD database.
- **Generating** reports containing legal land description records from the Interim System LLD database.
- **Generating** reports concerning meridian, township and range information from the Interim System LLD database.

3. Legal Land Description Processing Course Objectives

Write Objectives on a flipchart as each is reviewed.

The performance objectives outlined below should be met upon completion of the Interim System Legal Land Description Processing course.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the menu-driven Interim System, moving among the Interim System Main Menu, the Legal Land Description Processing Menu, and the submenu and forms used for automated legal land description processing tasks.
- access and use the Add/Change/Delete LLD Information Form (LAND100F) to add, change or delete legal land descriptions in the Interim System LLD database.
- access and use the Legal Land Description Report forms (LAND200F, LAND201F, LAND202F, and LAND203F) to enter selection criteria information and request off-line Interim System legal land description reports.

Review Class Schedule.

Prompt for and answer questions.

4. Menu-by-menu, Form-by-form

10 Minutes

Introduce the Menu-by-menu, Form-by-form module, its purpose and its organization into sections and subsections.

Prompt for and answer questions concerning each type of section in this module (Purpose, Navigation, Workflow, etc...) before moving on to discuss the next type of section.

Use appropriate training aids, as needed, for each menu and form section: Instructor/Student Computers, Keyboard Templates, LCD Panel and Overhead Projector, Training Database, Training Wall Displays, System Map, Flipcharts, Whiteboards, Markers, Training Guide, System Documentation and Data Element Dictionary.

Purpose of this module of the course:

The purpose of this training module of the Interim System Legal Land Description Processing course is to present the purpose and intended use of each form and submenu in Legal Land Description Processing. This module also provides an overview of the types of land and mineral recordation data addressed on each Legal Land Description Processing form.

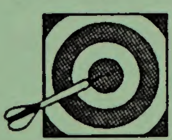
NOTE:
While the utility of each submenu and form is reviewed (along with a brief look at each form's fields), this module is not meant to present an in-depth look at each and every field.

Please see the Interim System documentation for a more thorough discussion of each field and the land and mineral information for which each is designed.

Organization of this course module:

This module of the Legal Land Description Processing Training Guide is divided into numerous sections, one for each submenu and form in Legal Land Description Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose**, **Navigation**, **Required Data**, **Structure**, **Workflow**, and **Quirks**.

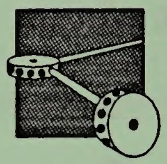
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs which describe the contents of each subsection.



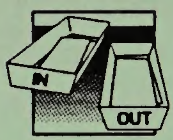
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete, or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data, the Structure subsection lists them. This subsection may also discuss whether a form (or page in a form) is divided into several blocks of fields, and whether these separate blocks address different categories of data. This subsection many also mention whether a certain page of a multi-page form is optional.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

NOTE:

In the sections of a few forms in this module, there are two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Legal Land Description Processing Menu

5 Minutes

Discuss navigation to the Legal Land Description Processing Menu from the Main Menu.

Review the general purpose of each menu option.

Refer to the Customer Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

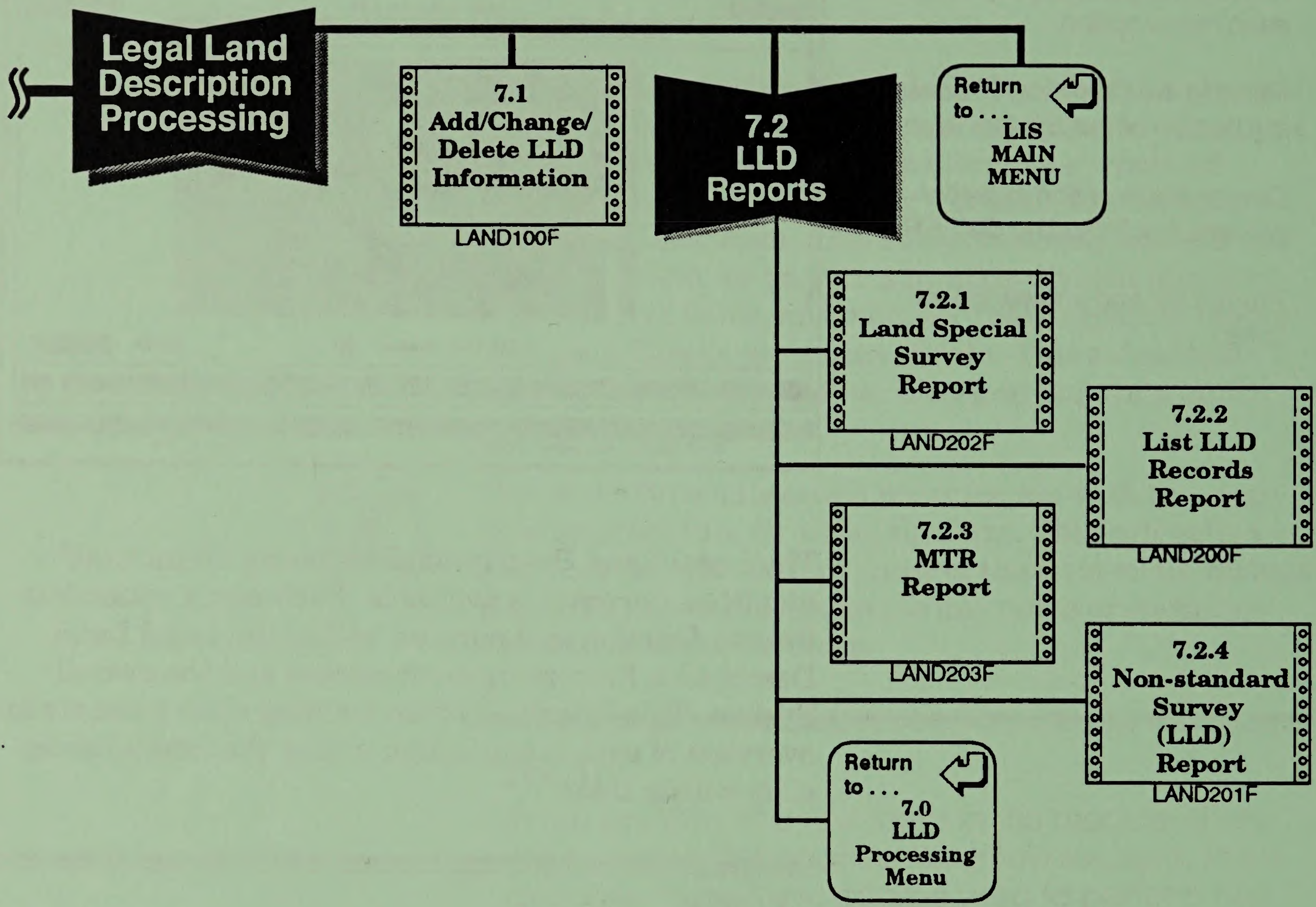
Prompt for and answer questions.

Legal Land Description Processing includes several tasks requiring data and System privileges restricted to a limited number of users. There are three sections or options on the Legal Land Description Processing Menu:

The Legal Land Description Processing Menu itself identifies the options available. Each menu option has its own function and purpose within the Legal Land Description Processing environment and the overall System. This Interim System training class presents an overview of each menu option and/or the form(s) accessible within them.

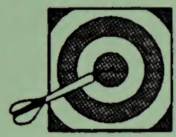
NOTE:

The Interim System Main Menu option returns you to the menu one level higher in the System, from which you can access other options in the Interim System.



Legal Land Description Processing
7.1 Add/Change/ Delete LLD Information
LAND100F
7.2 LLD Reports
Return to . . . LIS MAIN MENU
7.2.1 Land Special Survey Report
LAND202F
7.2.2 List LLD Records Report
LAND200F
7.2.3 MTR Report
LAND203F
7.2.4 Non-standard Survey (LLD) Report
LAND201F
Return to . . . 7.0 LLD Processing Menu

Add/Change/Delete LLD Information Form (LAND100F)



45 Minutes
(including Exercise E-1)

Review the purpose of the Add/Change/Delete LLD Information Form.

Purpose and use of Add/Change/Delete LLD Information Form:

This form allows you to query, add, change and delete the automated legal descriptions of all the parcels of land for which the BLM maintains records in your state. Each parcel of land associated with a land or mineral case in the Interim System should have a legal description stored in the System's Legal Land Description (LLD) section.

Explain how LLD records are used to validate all case land descriptions in the System to the section level.

NOTE:
Records within the LLD section of the System are used to validate case land information entered for land and mineral cases in the System.

Review who uses this form and why.

BLM personnel responsible for maintaining the Legal Land Description (LLD) section of the Interim System use this form to perform their tasks.

Review navigation to this form (including QXFER).

Navigation to this form and use of LAND100F program name in QXFER:

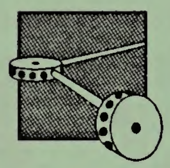
The Add/Change/Delete LLD Information Form (LAND100F) is an option on the Legal Land Description Processing Menu. It is accessed by choosing the Legal Land Description Processing Menu option from the Interim System Main Menu and then the Add/Change/Delete LLD Information option from the Legal Land Description Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the LAND100F program name.

Discuss data required to use this form.

Required data you must have to use this form:

- Meridian, Township, Range and Section.
- Survey Type (depending on the Survey Type, Survey Number and/or Aliquot Part information may also be required).
- Acres (specific to the LLD record).

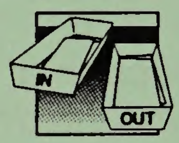
- Administrative State, Geographic State and Administrative Agency.
- Meridian Quadrant.
- BLM District Office.
- Congressional District.



Review this form's structure and the types of data that can be entered, retrieved, and updated.

Structure of the form:

The Add/Change/Delete LLD Information Form consists of a single page containing fields specifically related to information used by the BLM for legal descriptions of land parcels.



Workflow within this form to **query** the database for and retrieve existing LLD records:

NOTE: There are 3 workflows for this form – one to ***query and retrieve*** *existing LLD records, one to* ***change or delete*** *existing LLD records, and one to* ***add*** *new LLD records.*

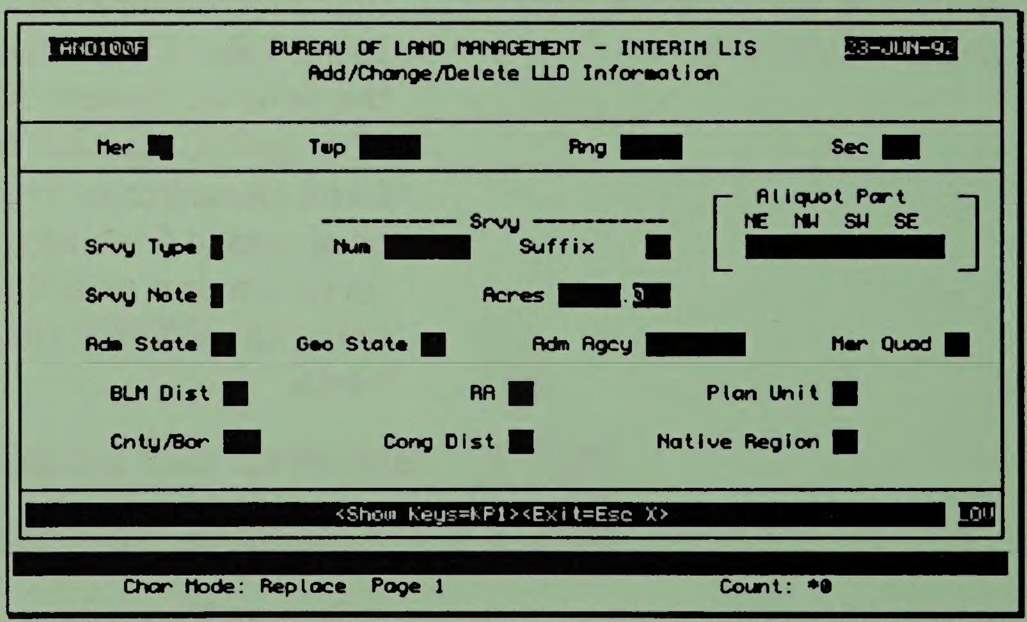
NOTE:

You must retrieve existing LLD records from the database before you can change or delete them. You may add new LLD records at any time, except while in query mode (i.e., after pressing ENTER QUERY and before pressing EXECUTE QUERY).

Review and demonstrate the step-by-step workflow to ***query and retrieve*** *an existing LLD record from the System.*

Use the available training aids, as needed.

Emphasize that LLD records must be retrieved from the database before they can be updated.



STEP 1

Demonstrate and discuss entering and executing a query to retrieve LLD record(s) from the System.

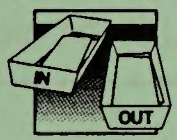
Press ENTER QUERY. You may use one or more of the fields on this form to enter query parameters. Enter these parameters and press EXECUTE QUERY. The System retrieves LLD records that match your query criteria, and displays the first record on the form.

If more than one LLD record is retrieved, use NEXT/PREVIOUS FIELD to scroll through the multiple records.

Once you have retrieved LLD record(s) from the database, you may change or delete them.

If you want to add a new record after querying exiting records, press CREATE RECORD to create a blank LLD record and follow the instructions outlined in the workflow section for this form that describes how to add LLD records to the database.

or...



Workflow within this form to **change** or **delete** existing LLD records:

*Review and demonstrate the step-by-step workflow to **change or delete** an existing LLD record from the System. Emphasize that a record must be retrieved before it can be updated.*

NOTE:

You cannot change or delete an existing LLD record until it has been retrieved in a database query and is displayed on the form.

STEP 1

Emphasize that updates of multiple records can be made during the same session.

Mention that to delete a record, COMMIT must be pressed after DELETE RECORD.

To change field values within a displayed LLD record, use NEXT/PREVIOUS FIELD to move the cursor through the fields of the record, making changes as needed.

To delete a displayed LLD record, press DELETE RECORD. Although the record is removed from the form, you must press COMMIT to actually delete the record from the System.

STEP 2

Emphasize that to save updates, COMMIT must be pressed before exiting or entering new query parameters. A warning message appears if updates are made and COMMIT is not pressed.

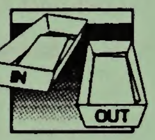
After making changes to a record or deleting a record, you may COMMIT the change or deletion, scroll to other LLD records retrieved in the same database query to make additional changes or deletions, or add new LLD records.

Always COMMIT your updates before exiting or entering another query.

NOTE:

If you press ENTER QUERY or EXIT without first committing changes or deletions, a message appears on the message line asking if you want to COMMIT changes you have made before exiting or continuing with a new query.

or...



Workflow within this form to **add** LLD records to the database and a review of the form's fields:

WARNING:

When an existing LLD record is displayed on the this form, entering new data **changes** the existing record. Be certain to press CREATE RECORD before entering a new LLD record.

*Review and demonstrate the step-by-step workflow to **add** a new LLD record to the System.*

STEP 1

Warn students to press CREATE RECORD before entering data for a new record, otherwise unwanted changes to existing records can easily be made.

Discuss how each LLD record in the System should describe an individual, legally definable parcel of land.

Each LLD record added to the database should describe an individual, legally definable parcel of land within a single section (e.g., aliquot part, minor aliquot part, parcel, tract, mining claim, Indian allotment, townsite block, lot, etc...).

Enter the required meridian code, township, range and section information appropriate for the LLD record you want to add to the database. Use the List of Values (LOV) available for the Meridian field, if necessary.

Demonstrate and discuss LOV where available.

Explain why LLD records containing whole township designations should be created before records having fractional township designations.

NOTE:

If you enter a fractional township designation for an LLD record, and no existing LLD record contains the whole township designation, the System may take several minutes (e.g., 25) to process this entry. If you create LLD records containing the whole township designation before adding records with the fractional township designation, processing times may be reduced significantly.

STEP 2

*Discuss and demonstrate entering survey information, including **X's** in the Aliquot Part field.*

Enter the required survey type code for the parcel of land this record describes. Use the available List of Values (LOV), if necessary.

If the survey type entered requires a survey number, enter the survey number. If the survey type entered does not allow a survey number, you receive an error message when you attempt to enter a survey number. Survey types that require or allow a survey number also allow a survey number suffix; enter a suffix if appropriate. You cannot enter a suffix without also entering a survey number.

If the survey type entered requires aliquot part information, the cursor automatically moves to the Aliquot Part field. Enter an **X** in the spaces of the Aliquot Part field to specify each aliquot part (quarter-quarter section) making up the parcel of land described by this LLD record.

NOTE:

Although up to 16 **X**'s may be entered to identify aliquot parts (quarter-quarter sections) within an LLD record, it is rare for more than two **X**'s to be entered in any one record.

Mention that survey notes are entered only if non-standard conditions exist for the applicable cadastral survey. Also mention that the acres value must be greater than zero, and may be filled automatically.

Enter the optional survey note code if non-standard conditions exist in the records for the cadastral survey made on the lands described by this LLD record. Use the available List of Values (LOV), if necessary.

Enter the required number of acres (whole number and decimal portions) for the parcel of land described by this LLD record. The number of acres entered must be greater than zero. If survey type **A** was entered, the System automatically completes the Acres fields based on the number of **X**'s entered in the Aliquot Part field, and the cursor skips to the Administrative State field.

STEP 3

Enter the following information in the appropriate fields for the parcel of land described in this LLD record. Use the available Lists of Values (LOV), if necessary:

Review and discuss each of the remaining data elements on this form. Emphasize that most are required, except County/ Borough, Resource Area, Planning Unit and Native Region.

- Administrative State abbreviation (required) identifying the state responsible for administering the land. Administrative State defaults to your state's abbreviation.

- Geographic State abbreviation (required) identifying the state in which the land exists. Geographic State must be compatible with Administrative State.

- Administrative Agency code (required) identifying the agency that maintains administrative jurisdiction over federal surface lands (e.g., BLM, USFS, NPS, etc...).

- Meridian Quadrant code (`NE`, `NW`, `SW`, `SE`) identifying the location of the parcel relative to the baseline and principle meridian (required).

- District Office (required), Resource Area and Planning Unit codes (optional) identifying the BLM office(s) responsible for the land. If your state does not have Resource Areas and/or Planning Units, these fields should remain blank.

- County/Borough code (optional) identifying the county or borough in which the land exists.

- Congressional District code (required) identifying the congressional district in which the land exists.

- Native Region code (optional and for Alaska only) identifying the Alaska Native Region in which the land exists.

STEP 4

Once you enter all the data needed to legally describe the parcel of land for the LLD record, press COMMIT and save this information in the Legal Land Description section of the System.

Warn students that if ENTER QUERY or EXIT is pressed before committing additions, the System normally asks if data should be committed before continuing. However, if a query was not executed prior to adding a new record, and EXIT is pressed, the System does not ask if data should be saved; the user exits the form and entered data is lost.

If you press ENTER QUERY without first committing an addition, a message appears on the message line asking if you want to COMMIT changes you have made before continuing with the new query.

If you entered and executed a query in this session prior to adding an LLD record, and press EXIT without first committing the addition, this same message appears.

WARNING:

If you did not enter and exit a query prior to adding an LLD record, and you EXIT the form before committing the addition, you will lose it. The System does not ask if you want to save your addition.

You may continue adding more LLD records by pressing the CREATE RECORD key and entering additional data.

Mention how to use DUPLICATE RECORD to save time and effort.

NOTE:

If you are adding several new LLD records, you may find that duplicating the previously committed (or retrieved) LLD record with DUPLICATE RECORD saves having to reenter identical LLD information over and over again.

Review the Quirks subsection with the class, point by point, and summarize the use of the Add/Change/Delete LLD Information Form.

Quirks and special data issues for LAND100F:

- Records within the LLD section of the System are used to validate case land information entered for land and mineral cases in the System.
- This form can be used to query, change, delete and add LLD records in the System's Legal Land Description section. All four functions can be performed in the same session.
- You must retrieve existing LLD records from the database before you can change or delete them. You may add new LLD records at any time, except while in query mode.
- If you want to add a new record after querying exiting records, press CREATE RECORD to create a blank LLD record.
- Always COMMIT your updates before exiting or entering another query. If you press ENTER QUERY or EXIT without first committing changes or deletions, a message appears on the message line asking if you want to COMMIT changes you have made before exiting or continuing with a new query.

- When an existing LLD record is displayed on the this form, entering new data **changes** the existing record. Be certain to press CREATE RECORD before entering a new LLD record.

- If you enter a fractional township designation for an LLD record, and no existing LLD record contains the whole township designation, the System may take several minutes (e.g., 25) to process this entry. If you create LLD records containing the whole township designation before adding records with the fractional township designation, processing times may be reduced significantly.

- Although up to 16 X's may be entered to identify aliquot parts (quarter-quarter sections) within an LLD record, it is rare for more than two X's to be entered in any one record.

- If survey type A was entered, the System automatically completes the Acres fields based on the number of X's entered in the Aliquot Part field, and the cursor skips to the Administrative State field.

- If you press ENTER QUERY without first committing an addition, a message appears on the message line asking if you want to COMMIT changes you have made before continuing with the new query. If you entered and executed a query in this session prior to adding an LLD record, and press EXIT without first committing the addition, this same message appears. If you did not enter and exit a query prior to adding an LLD record, and you EXIT the form before committing the addition, you will lose it. The System does not ask if you want to save your addition.

- If you are adding several new LLD records, you may find that duplicating the previously committed (or retrieved) LLD record with DUPLICATE RECORD saves having to reenter identical LLD information over and over again.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise E-1 (Add/Change/Delete LLD Information)

LLD Reports Menu

5 Minutes

Discuss navigation to the LLD Reports Menu from the LLD Processing Menu.

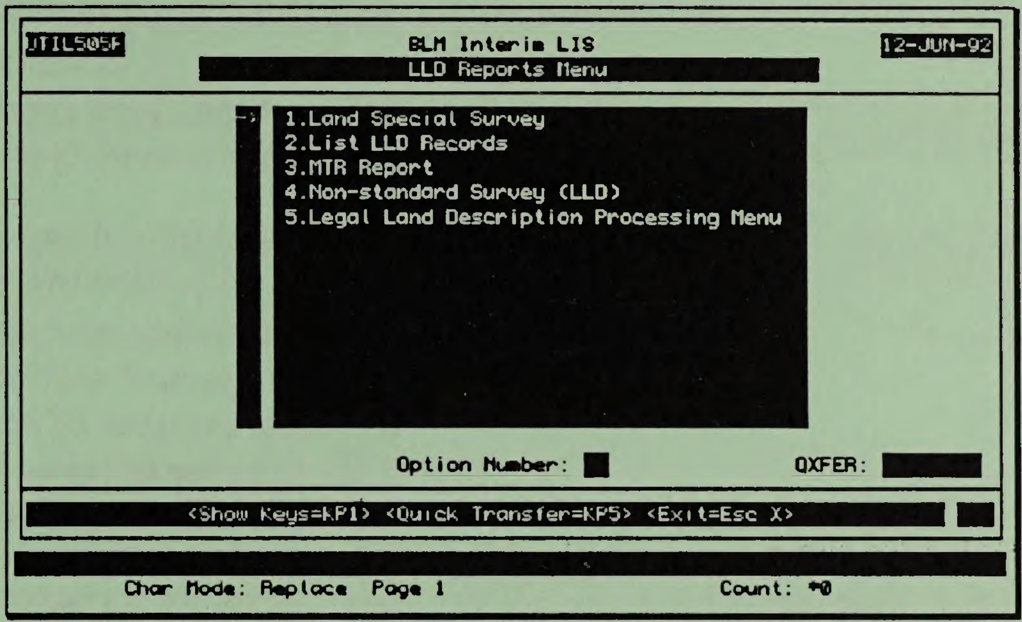
Review the general purpose of each menu option.

Refer to the LLD Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions.

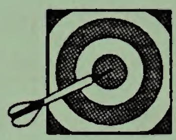
Through the LLD Reports Menu, you may access forms that allow you to generate reports containing land descriptions stored in the Legal Land Description section of the System. LLD reports do not include any case information, nor do they relate any land descriptions to cases. There are four available forms on the LLD Reports Menu used to enter selection criteria for report requests:



NOTE:

The Legal Land Description Processing Menu option returns you to the menu one level higher in the System from which you can access other options in Legal Land Description Processing.

Land Special Survey Report Form (LAND202F)



15 Minutes

Review the purpose of the Land Special Survey Report Form, as well as its output.

Purpose and use of the Land Special Survey Report Form:

This form allows you to generate a 132-column report listing legal land descriptions, either for one specified survey type or all survey types, within a specified geographic area. The geographic area can be one or more quadrants of a specific principal meridian, or a block of townships within one quadrant of a specified meridian. If you specify one or more meridian quadrants, you must also limit the report to one specific survey type. If the report is not restricted to a specific survey type, legal land descriptions are listed in ascending survey type order.

Each legal land description listed on this report may contain the following data elements: survey type, survey number, survey suffix, acres, meridian, township, range and section. In addition, the report lists the total number of acres for each survey number, the total number of acres for each survey type, and the grand total number of acres for the report.

Review who uses this form and why.

BLM personnel responsible for generating reports containing legal land descriptions from the System's LLD section, sorted according to survey type(s), for specified geographic areas use this form to perform their tasks.

!

Warn students about the potential size of the Land Special Survey Report and the impact it can have on System performance.

WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.

Review navigation to this form (including QXFER).

Navigation to this form and use of LAND202F program name in QXFER:

The Land Special Survey Report Form (LAND202F) is an option on the LLD Reports Menu. It is accessed by choosing the Legal Land Description Processing Menu option from the Interim System Main Menu, then the LLD Reports Menu option from the Legal Land Description Processing Menu, and finally the Land

```
LAND201R                                        BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE: ALASKA                                        LAND SPECIAL SURVEY

 TYPE          S U R V E Y
SURVEY    TYPE   NUMBER  SUFFIX            ACRES      MERIDIAN     TOWNSHIP     RANGE      SECTION
 UNK       S                              640.000        44          0060N      0060W        002
 UNK       S                              640.000        44          0060N      0060W        004
 UNK       S                              640.000        44          0060N      0060W        005
 UNK       S                              615.270        44          0060N      0060W        006
 UNK       S                              640.000        44          0060N      0060W        009
 UNK       S                              640.000        44          0060N      0060W        010
 UNK       S                              640.000        44          0060N      0060W        011
 UNK       S                              640.000        44          0060N      0060W        002
 .
 .
 .
 USS       S                              640.000        44          0060N      0060W        028
 USS       S                              640.000        44          0060N      0060W        032
 USS       S                              617.430        44          0060N      0060W        033

          TOTAL FOR SURVEY NUMBER  =    22923.920

          TOTAL FOR SURVEY TYPE    =     7017.430

          GRAND TOTAL              =    22923.920
```

Special Survey option from the LLD Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the LAND202F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Meridian Code.
- One or more Meridian Quadrants or a Township designation range and a Range designation range.
- Survey Type (required only if one or more meridian quadrants are specified).
- A decision to have the Land Special Survey Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.

Structure of the form:

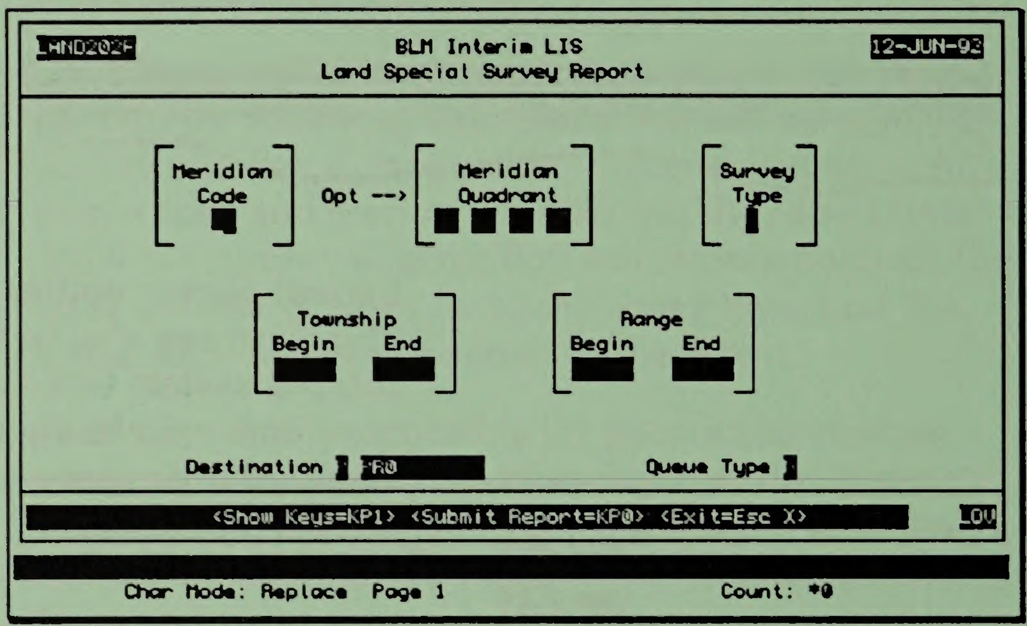
Review this form's structure and the types of data that can be entered.

The Land Special Survey Report Form consists of a single page containing fields that allow you to enter the meridian code, meridian quadrant numbers, survey type, and begin and end township and range specifications that specify the geographic area and survey type(s) for the report. The form also contains fields that allow you to specify whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.

Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Land Special Survey Report Form.

Use the available training aids, as needed.



STEP 1

Demonstrate and discuss LOV where available.

Enter the required meridian code that limits the geographic scope of the report to only those legal land descriptions containing this specified meridian. Use the available List of Values (LOV), if necessary.

STEP 2

Thoroughly review and demonstrate the 2 selection criteria options available to limit the geographic scope of this report: specifying meridian quadrant(s) or begin & end township and range values.

You must further limit the geographic scope of the report to either one (or more) meridian quadrant(s) or a block of townships within a single quadrant.

This form requires you to enter value(s) in either the Meridian Quadrant fields or the Township and Range Begin and End fields, but not both.

To limit the geographic scope of the report to one or more quadrant(s) of the specified meridian, enter the desired quadrant abbreviations (NE, NW, SE, SW). Up to four quadrants may be specified.

NOTE:

Emphasize that users must specify either meridian quadrant(s) or a block of townships within a single quadrant..

If you do not specify any quadrants for the report, you are required to specify a block of townships within a single quadrant in the Township and Range Begin and End fields.

STEP 3

Emphasize that a survey type is required if meridian quadrant(s) are entered.

To limit the scope of the report to only those legal land descriptions having one specific survey type, enter the desired survey type code. Use the available List of Values (LOV), if necessary. If you specified a meridian quadrant(s), a survey type is required. A survey type is not required if you specify a block of townships within a single quadrant.

Mention that if no meridian quad(s) are entered, the Survey Type field is skipped automatically and becomes optional.

If you did not specify a meridian quadrant(s), the cursor moves to the Township Begin field. If you specified a quadrant(s), the cursor skips the Township and Range Begin and End fields and moves to the first destination field.

STEP 4

Emphasize that a block of townships within a single meridian quadrant must be specified if no meridian quadrant(s) are entered.

If you did not specify a meridian quadrant(s), you must specify a block of townships within a single quadrant of the selected meridian by entering values in the Township and Range Begin and End fields.

Mention that beginning values must be equal to or lower than ending values, and that direction values for a begin-end pair must be the same.

Enter the beginning and ending township designations and the beginning and ending range designations in the appropriate fields. The beginning designations must be equal to or lower than the ending designations. Since this block of townships must fall within one meridian quadrant, the direction values in the Township Begin and End fields (N or S) must be identical, and the direction values in the Range Begin and End fields (E or W) must also be identical.

If meridian quadrant(s) were entered, an error messages is displayed if you attempt to enter values in the Township and Range Begin and End fields.

STEP 5

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a 132-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the Land Special Survey Report Form generates a 132-column printout, and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

!

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the Land Special Survey Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user72 on ZEUS) at 13:01
```

`Job LAND202R.092445.CPL for RUREADI (#10761) completed`

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the Land Special Survey Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Review the Quirks subsection, point by point, with the class, and briefly summarize the use of the Land Special Survey Report Form.

Quirks and special data issues for LAND202F:

- Carefully consider the amount of data accessed during the creation of this report. Generating a Land Special Survey Report containing large amounts of information may cause System performance to deteriorate.

- This form requires you to enter value(s) in either the Meridian Quadrant fields or the Township and Range Begin and End fields, but not both. If you do not specify any quadrants for the report, you must specify a block of townships within a single quadrant.

- If you specify a meridian quadrant(s), a survey type is required. A survey type is not required if you specify a block of townships within a single quadrant.

- If you specify a block of townships within a single quadrant, the beginning township and range designations must be equal to or lower than the ending designations. Since a block of townships must fall within one meridian quadrant, the direction values in the Township Begin and End fields (`N` or `S`) must be identical, and the direction values in the Range Begin and End fields (`E` or `W`) must also be identical. If you specify a meridian quadrant(s), you receive error messages if you attempt to enter values in the Township and Range Begin and End fields.

- When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You

cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

List LLD Records Report Form (LAND200F)

10 Minutes

Review the purpose of the List LLD Records Report Form, as well as its output.

Emphasize that no selection criteria need to be specified to generate this report.

Purpose and use of the List LLD Records Report Form:

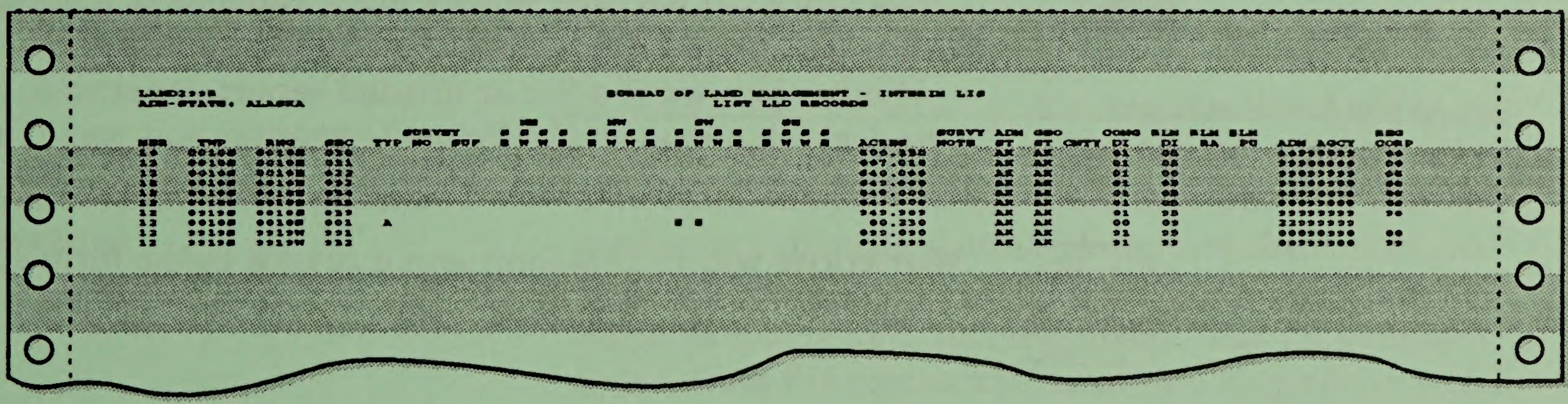
This form allows you to generate a 132-column report listing all legal land descriptions in the Legal Land Description section of the System. Land descriptions are listed in order by ascending meridian, township and range values.

This report has no selection criteria.

Each legal land description listed on this report may contain the following data elements: meridian, township, range, section, survey type, survey number and suffix, aliquot part data, acres, survey note, administrative state, geographic state, county/borough, congressional district, BLM district, resource area and planning unit, administrative agency and native region.

Review who uses this form and why.

BLM personnel responsible for generating a report containing every legal land description in the System's LLD section, sorted by meridian, township and range, use this form to perform their task.



Warn students about the size of the List LLD Records Report and the impact it can have on System performance.

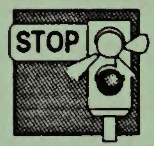
WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.

Review navigation to this form (including QXFER).

Navigation to this form and use of LAND200F program name in QXFER:

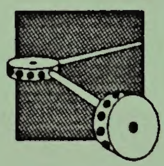
The List LLD Records Report Form (LAND200F) is an option on the LLD Reports Menu. It is accessed by choosing the Legal Land Description Processing Menu option from the Interim System Main Menu, then the LLD Reports Menu option from the Legal Land Description Processing Menu, and finally the List LLD Records option from the LLD Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the LAND200F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

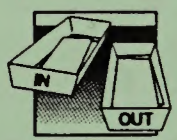
- A decision to have the List LLD Records Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

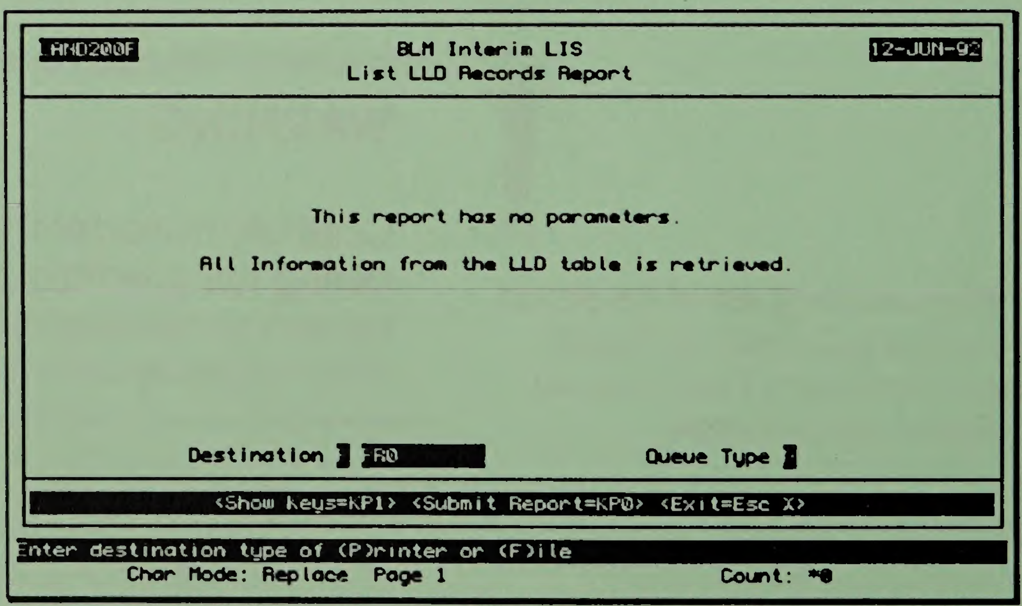
The List LLD Records Report Form consists of a single page containing fields that allow you to specify whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the List LLD Records Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



LAND200F BLM Interim LIS 12-JUN-92
List LLD Records Report

This report has no parameters.

All Information from the LLD table is retrieved.

Destination PR0 Queue Type

<Show Keys=KP1> <Submit Report=KP0> <Exit=Esc X>

Enter destination type of (P)rinter or (F)ile
Char Mode: Replace Page 1 Count: *0

STEP 1

Explain why there are no selection criteria on this form to help limit the scope of the report's contents.

There are no selection criteria for this report. To generate a report containing all legal land descriptions in the System's Legal Land Description section, simply specify the destination of the report and the job queue in which to place the report request.

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a 132-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the List LLD Records Report Form generates a 132-column printout and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the List LLD Records Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user78 on ZEUS) at 15:07

Job LAND200R.185403.CPL for RUREADI
(#00801) completed
```

This message indicates that the List LLD Records Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for LAND200F:

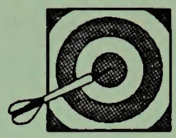
Review the Quirks subsection, point by point, with the class, and briefly summarize the use of the List LLD Records Report Form.

- Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.
- This report has no selection criteria.
- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is

waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

MTR Report Form (LAND203F)



10 Minutes

Review the purpose of the MTR Report Form, as well as its output.

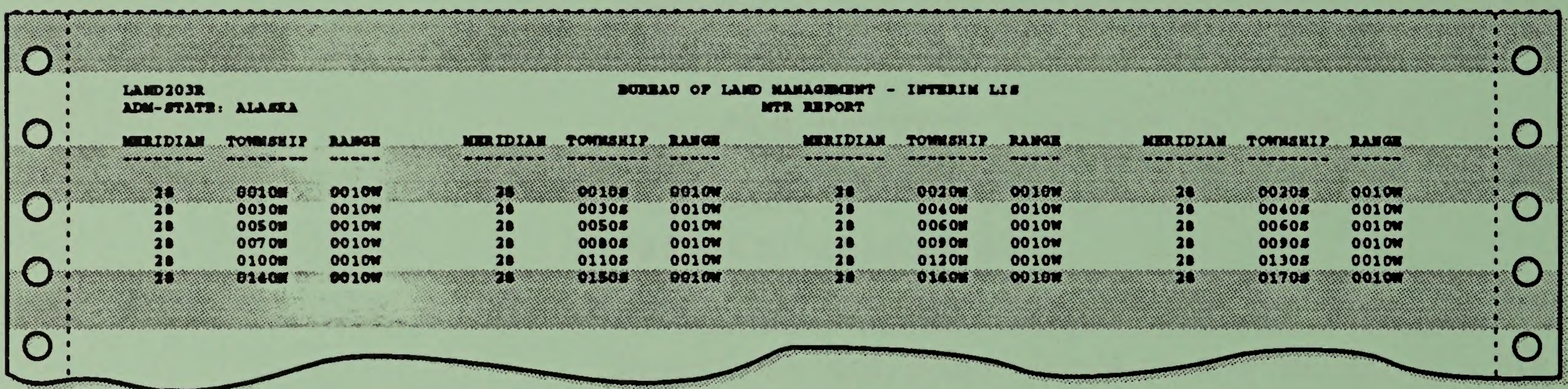
Purpose and use of the MTR Report Form:

This form allows you to generate a 132-column report listing all of the townships in a specified meridian having a specific range designation (e.g., `0170W`).

The report lists the meridian, township and range designations of each township meeting the selection criteria, as well as the total number of townships. Townships are sorted by ascending meridian, township and range.

Review who uses this form and why.

BLM personnel responsible for generating MTR Reports use this form to perform their tasks.



LAND203R BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE: ALASKA MTR REPORT

MERIDIAN	TOWNSHIP	RANGE	MERIDIAN	TOWNSHIP	RANGE	MERIDIAN	TOWNSHIP	RANGE	MERIDIAN	TOWNSHIP	RANGE
28	0010N	0010W	28	0010S	0010W	28	0020N	0010W	28	0020S	0010W
28	0030N	0010W	28	0030S	0010W	28	0040N	0010W	28	0040S	0010W
28	0050N	0010W	28	0050S	0010W	28	0060N	0010W	28	0060S	0010W
28	0070N	0010W	28	0080S	0010W	28	0090N	0010W	28	0090S	0010W
28	0100N	0010W	28	0110S	0010W	28	0120N	0010W	28	0130S	0010W
28	0140N	0010W	28	0150S	0010W	28	0160N	0010W	28	0170S	0010W

Review navigation to this form (including QXFER).

Navigation to this form and use of LAND203F program name in QXFER:

The MTR Report Form (LAND203F) is an option on the LLD Reports Menu. It is accessed by choosing the Legal Land Description Processing Menu option from the Interim System Main Menu, then the LLD Reports Menu option from the Legal Land Description Processing Menu, and finally the MTR Report option from the LLD Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the LAND203F program name.

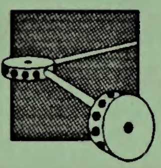
Discuss data required to use this form.

Required Data you must have to use this form:

- Meridian code.
- Range designation.

- A decision to have the MTR Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.

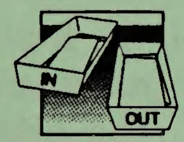
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

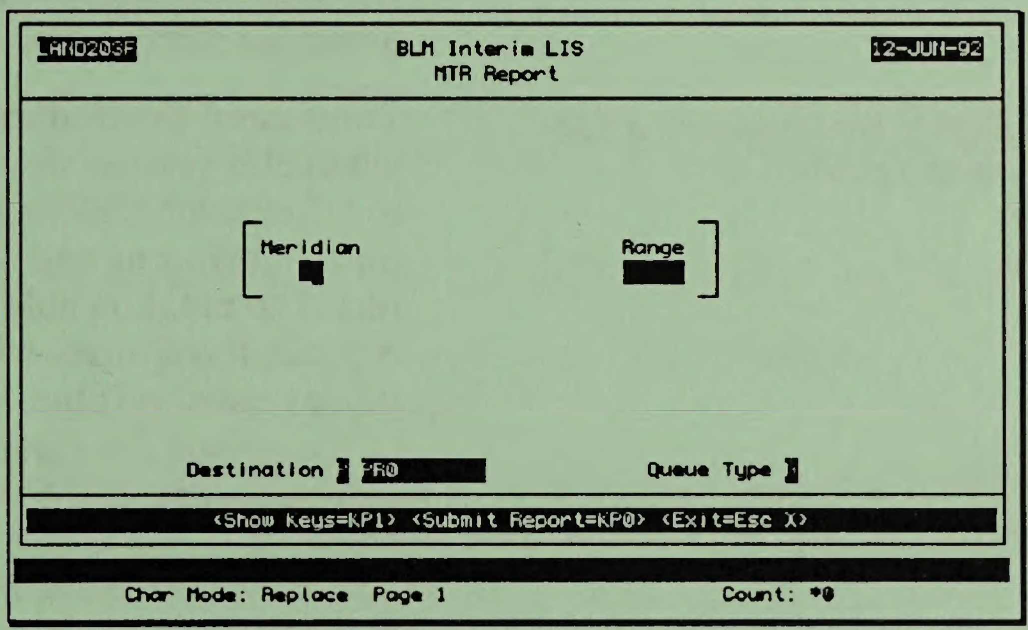
The MTR Report Form consists of a single page containing fields that allow you to specify the meridian code, range designation, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the MTR Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Mention that there is no List of Values (LOV) available for the required Meridian field.

Explain how selection criteria on this form, especially the range value, defines and limits the geographic scope of this report.

Enter the required meridian code to limit the geographic scope of this report to an single principal meridian. There is no List of Values (LOV) available for this field.

Enter the required range designation to limit this report to those townships having the specified range value (e.g., `0300W`). There is no List of Values (LOV) for this field.

Emphasize that the System validates range direction values, but not range numbers. Also mention that fractional range designations are not allowed.

NOTE:

The System does not validate the range number entered (i.e., the first three digits of the range designation).

Fractional range designations (e.g., **0302W** for range 30 1/2 west) are not accepted by this form. An error message appears if you enter a fractional number.

STEP 2

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a **P** or an **F** in the first Destination field; the letter **P** indicates that you want a 132-column printout of the report, and the letter **F** indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination contains the printer ID for a particular printer in your office and/or state. Remember that the MTR Report Form generates a 132-column printout and that the printer you route the report to must be able to accommodate 132-column reports; the System will not allow you to choose any other type of printer. Enter the appropriate printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:

A default printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the MTR Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user71 on ZEUS) at 18:41

Job LAND203R.124139.CPL for RUREADI
(#20991) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the MTR Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for LAND203F:

Review the Quirks subsection, point by point, with the class, and briefly summarize the use of the MTR Report Form.

- There are no Lists of Values (LOV) available for the Meridian and Range fields.
- The System does not validate the range number entered (i.e., the first three digits of the range designation).

- Fractional range designations (e.g., `0302W` for range 30 1/2 west) are not accepted by this form. An error message appears if you enter a fractional number.
- When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Non-standard Survey (LLD) Report Form (LAND201F)

15 Minutes
(including Exercise E-2)

Review the purpose of the Non-standard Survey (LLD) Report Form, as well as its output.

Review how non-standard survey information is recorded in LLD records.

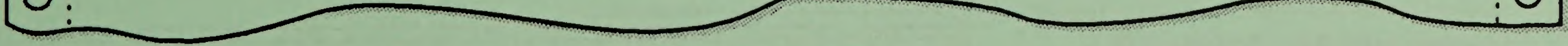
Purpose and use of the Non-standard Survey (LLD) Report Form:

This form allows you to generate a 132-column report listing legal land descriptions containing a specified survey note or those descriptions containing any survey note. A survey note indicates that non-standard conditions exist in the records for the cadastral survey made on land described by a legal description. The report lists land descriptions in ascending order by survey note and meridian, township, range and section.

Each legal land description listed on this report may contain the following data elements: survey note, meridian, township, range, section, survey type, survey number and suffix, geographic state, county/borough, congressional district, BLM district, resource area and planning unit, administrative agency and native region.

Review who uses this form and why.

BLM personnel responsible for generating Non-standard Survey (LLD) Reports use this form to perform their tasks.



LAND201R
ADM-STATE: ALASKA

BUREAU OF LAND MANAGEMENT - INTERIM LIS
NON-STANDARD SURVEY (LLD)

SRVY NOTE	MER	TWN	RNG	SEC	Survey TYP	NO	SUF	GEO ST	CNTY	CONG DI	BLM DI	BLM RA	BLM PU	ADM AGCY	REG CORP
A	28	0010N	0030E	099	U			AK		00	04			10	
R	44	0060N	0060W	002	S			AK		01	07			99999999	10
R	44	0060N	0060W	004	S			AK		01	07			99999999	10
R	44	0060N	0060W	006	S			AK		01	07			99999999	10
R	44	0060N	0060W	009	S			AK		01	07			99999999	10
R	44	0060N	0060W	010	S			AK		01	07			99999999	10
R	44	0060N	0060W	011	S			AK		01	07			99999999	10
R	44	0060N	0060W	012	S			AK		01	07			99999999	10

WARNING:

Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.

Warn students about the potential size of the Non-standard Survey Report and its impact on System performance.

Review navigation this form (including QXFER).

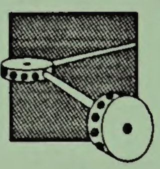
Navigation to this form and use of LAND201F program name in QXFER:

The Non-standard Survey (LLD) Report Form (LAND201F) is an option on the LLD Reports Menu. It is accessed by choosing the Legal Land Description Processing Menu option from the Interim System Main Menu, then the LLD Reports Menu option from the Legal Land Description Processing Menu, and finally the Non-standard Survey (LLD) option from the LLD Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the LAND201F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

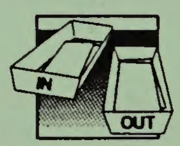
- A decision to have the Non-standard Survey (LLD) Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered..

Structure of the form:

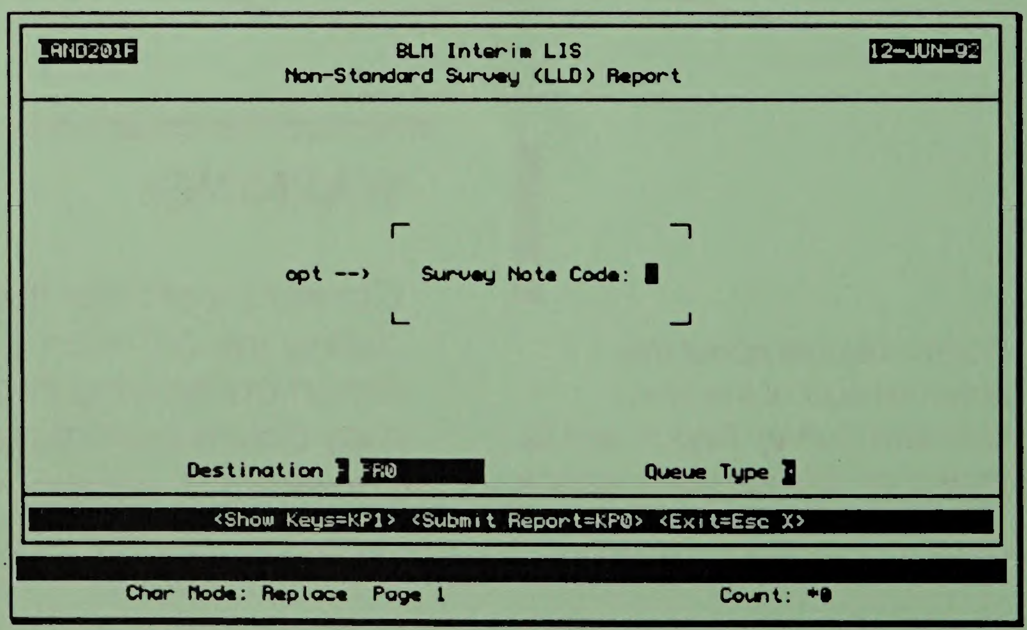
The Non-standard Survey (LLD) Report Form consists of a single page containing fields that allow you to specify a survey note code, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the Non-standard Survey (LLD) Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Emphasize that the selection criteria entered determine whether this report will contain LLD records for only a single, specified survey note or for all valid survey notes.

You may generate a Non-standard Survey (LLD) Report listing legal land descriptions that contain a specified survey note or those descriptions containing any valid survey note.

To generate this report for a single survey note, enter the appropriate code. Use the available List of Values (LOV), if necessary.

Demonstrate and discuss LOV where available.

To generate this report for all valid survey notes, leave the Survey Note field blank, and move to the first Destination field.

STEP 2

The two Destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want a 132-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose a 132-column printer.

The second Destination field contains the printer ID for a particular printer in your office and/or state. Remember that the Non-standard Survey (LLD) Report Form generates a 132-column printout and that the printer you route the report to must be able to accommodate 132-column reports. Enter the appropriate printer ID in the second Destination field, using the available list of Values (LOV), if necessary.

NOTE:
A default printer ID may appear automatically in the second Destination field.

Discuss the different queues available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the Non-standard Survey (LLD) Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user41 on ZEUS) at 07:27

Job LAND201R.124207.CPL for RUREADI
(#20112) completed
```

This message indicates that the Non-standard Survey (LLD) Report has been either printed out or written to a file depending on the destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Review the Quirks subsection, point by point, with the class, and briefly summarize the use of the Non-standard Survey (LLD) Report Form.

Quirks and special data issues for LAND201F:

- Carefully consider the amount of data accessed during the creation of this report. Generating a report containing large amounts of information may cause System performance to deteriorate.
- When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact

your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise E-2 (LLD Report Forms).

30 Minutes
(Course Review and Summary, Questions, Close-Out and Evaluations)

Briefly review and summarize the material covered in the LLD Processing Course.
Prompt for and answer questions.

Close-Out with the class, and have each participant fill out an Instructor Evaluation Form.

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F

F. Accounting Advice Processing Training Guide

Instructor's Version
Includes Teaching Notes

The purpose of this course is...

- To teach students to perform accounting advice processing functions using the Interim System forms. These functions include:
  - entering accounting advice information unrelated to a case and printing a receipt
  - printing an historical receipt
  - entering accounting advice data and money action records for blocks of case serial numbers, and printing a receipt
  - voiding an accounting advice
  - entering accounting advice data and money action records for random case serial numbers, and printing a receipt
  - transferring financial transactions within a case serial number or accounting advice
  - generating reports concerning accounting advice information

1. The Interim System Accounting Advice Processing Course

1.1 Participants

10 minutes
(Instructor Introductions, Purpose on page 1, Participants, Prerequisites and Questions)

The Interim System Accounting Advice Processing course teaches BLM employees how to access and use the portions of the Interim System specifically designed for entering, printing, voiding and reporting on accounting advice information in the Interim System database. Accounting advice data may or may not be related to a serialized case in the database. This portion of the Interim System is restricted to a select number of BLM employees responsible for the entry and maintenance of accounting advice data. Only BLM employees responsible for either accounting advice processing tasks or the support or supervision of such tasks should participate in this course.

Emphasize who should and should not be in this class.

Individuals participating in this course should fit clearly into at least one of the following personnel categories:

Ad-Hoc Data Query Personnel
This category of users develops ad-hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Accounting Advice Processing Personnel
This category of individuals performs financial transaction functions in the Interim System accounting advice database. These users enter accounting advice data both related and unrelated to cases, print historical receipts, void accounting advices and generate off-line accounting advice reports.

System Application Support & Maintenance Personnel
Individuals in this category maintain the operational status of the Prime computers and the Interim System software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

Emphasize that this course will make little sense to those who have not taken the prerequisite course. Mention that knowledge of adding and updating action records from the Case Processing Course will be of great help in understanding material in Accounting Advice processing.

• Exposure to and understanding of the information presented in the *Interim System Data Retrieval (BLM)* course.

• While not required, exposure to and understanding of the information presented in the *Interim System Case Processing* course will help students more easily understand case-related accounting advice functions.

Although the *Interim System Accounting Advice Processing* course contains a brief review and question and answer session concerning the concepts, terms and access procedures (Prime and Interim System) taught in the prerequisite course, students should already be familiar with this material. Students should also be familiar with the purposes and use of Interim System forms in Report Processing and Data Retrieval Functions. Interim System Accounting Advice Processing trainers will assume that participants need only a quick warm-up before launching into new information. Students should review all the training materials they received in the prerequisite course before coming to class.

All Interim System Accounting Advice Processing course participants should be familiar with the following topics:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What types of data manipulations the Interim System can perform.
- Interim System and Structured Query Language (SQL) concepts and terminology.
- How to access and navigate on the Prime.
- How to access the Interim System and use Interim System/Oracle login procedures.
- Interim System security.

- Interim System structure, system map, and basic navigation in the menu-driven Interim System.
- Functional use of Interim System Report Processing and Data Retrieval Functions.
- Proper use of the forms in Report Processing and Data Retrieval Functions for the performance of all on-line and off-line data retrieval tasks in the Interim System database.

Prompt for and answer questions.

15 minutes
(Ice Breaker, Housekeeping Rules and Attendance)

For an Ice Breaker, have students fill out name tags/ place cards and introduce themselves.

Review the Housekeeping Rules of the class room.

Pass Attendance Sign-In Sheet around the class.

2. Purpose of Accounting Advice Processing Course

10 minutes
(Purpose of this course (Restate), What is Accounting Advice Processing?, Course Objectives and Course Schedule)

Restate the purpose of the Accounting Advice Processing Course.

To teach students to perform accounting advice processing functions using the Interim System forms. These functions include: entering accounting advice data unrelated to a case and printing a receipt, printing an historical receipt, entering accounting advice data and money action records for a block of case serial numbers and printing a receipt, voiding an accounting advice, entering accounting advice data and money action records for random case serial numbers and printing a receipt, transferring financial transactions within a case or an accounting advice, and generating reports concerning accounting advice information.

2.1 What is Accounting Advice Processing?

This course uses the term accounting advice processing to address the set of automated tasks that affect accounting advice information stored in the accounting advice tables of the Interim System database. Specifically, accounting advice processing includes the following tasks:

Explain what accounting advice processing is in general and briefly review the tasks that can be performed using the forms in this section of the System.

Refer to the System Map when reviewing accounting advice processing tasks and forms.

- **Entering** accounting advice information unrelated to a case in the Interim System database, and **printing** a receipt.
- **Printing** an historical accounting advice receipt stored in the Interim System database.
- **Entering** accounting advice information and associated money action data for blocks of serialized cases in the Interim System database, and **printing** a receipt.
- **Voiding** an existing accounting advice in the Interim System database.
- **Entering** accounting advice information and associated money action data for random serialized cases in the Interim System database, and **printing** a receipt.

- **Entering** accounting advice financial transfer action data, and **updating** existing accounting advice and associated case money action data for a serialized case or an accounting advice in the Interim System database.

- **Generating** reports containing accounting advice information from the Interim System database.

3. Accounting Advice Processing Course Objectives

Write objectives on a flipchart as each is reviewed.

The performance objectives outlined below should be met upon completion of the Interim System Accounting Advice Processing course.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the menu-driven Interim System, moving among the Interim System Main Menu, the Accounting Advice Processing Menu, and the sub-menu and forms used for automated accounting advice processing tasks.
- access and use the Accounting Advice - Not Case Related Form (CASE141F) to enter accounting advice information unrelated to a case in the Interim System database, generate an accounting advice number, and print an accounting advice receipt.
- access and use the Print Historical Receipt Form (CASE142F) to produce an historical copy of a previously issued accounting advice receipt in the Interim System database.
- access and use the Accounting Advice - Block of Serial Numbers Form (CASE143F) to enter accounting advice information and associated money action records for multiple blocks of sequentially serialized cases in the Interim System database, generate an accounting advice number, and print an accounting advice receipt.
- access and use the Void an Accounting Advice Form (CASE144F) to void an accounting advice and all associated data (including the deletion of money action records in appropriate cases) created during the business day in the Interim System database.
- access and use the Accounting Advice for Random Serial Numbers Form (CASE162F) to enter accounting advice information and associated money action

records for random serialized cases in the Interim System database, generate an accounting advice number, and print an accounting advice receipt.

- access and use the Accounting Advice Transaction Transfers Form (CASE163F) to enter accounting advice financial transfer action data, and update existing accounting advice and associated case money action data for a serialized case or an accounting advice in the Interim System database.

- access and use the Accounting Advice Report forms (CASE299F, CASE300F, CASE309F, CASE351F and CASE352F) to enter selection criteria information and request off-line Interim System accounting advice reports.

Review Class Schedule

Prompt for and answer questions.

4. Menu-by-menu, Form-by-form

10 minutes
(Introduce the Menu-by-menu, Form-by-form module, its purpose and its organization into sections and subsections)

Prompt for and answer questions concerning each type of section in this module (Purpose, Navigation, Workflow, etc....) before moving on to discuss the next type of section.

Use the appropriate training aids as needed for each menu and form section: Instructor/Student Computers, Keyboard Templates, LCD Panel and Overhead Projector, Training Database, Training Wall Displays, System Map, Flipcharts, Whiteboards, Markers, Training Guide, System Documentation, and Data Element Dictionary.

Reference to printed accounting advice receipt forms should be made throughout this course.

Purpose of this module of the course:

The purpose of this training module of the Interim System Accounting Advice Processing course is to present the purpose and intended use of each form and submenu in Accounting Advice Processing. This module also provides an overview of the types of land, mineral and accounting recordation data addressed on each Accounting Advice Processing form.

Note:

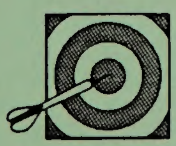
While the utility of each submenu and form is reviewed (along with a brief look at each form's fields), this module is not meant to present an in-depth look at each and every field.

Please see the Interim System documentation for a more thorough discussion of each field and the land, mineral and accounting advice information for which each is designed.

Organization of this course module:

This module of the Accounting Advice Processing Training Guide is divided into numerous sections, one for each submenu and form in Accounting Advice Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose**, **Navigation**, **Required Data**, **Structure**, **Workflow**, and **Quirks**.

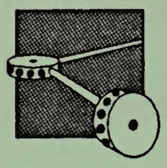
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs which describe the contents of each subsection.



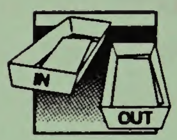
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete, or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data, the Structure subsection lists them. This subsection may also discuss whether a form (or page in a form) is divided into several blocks of fields, and whether these separate blocks address different categories of data. This subsection may also mention whether a certain page of a multi-page form is optional.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

Note:

In the sections of a few forms in this module, there may be two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Accounting Advice Processing Menu

5 minutes

Discuss navigation to the Accounting Advice Processing Menu from the Main Menu.

Review the general purpose of each menu option.

Refer to the Accounting Advice Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

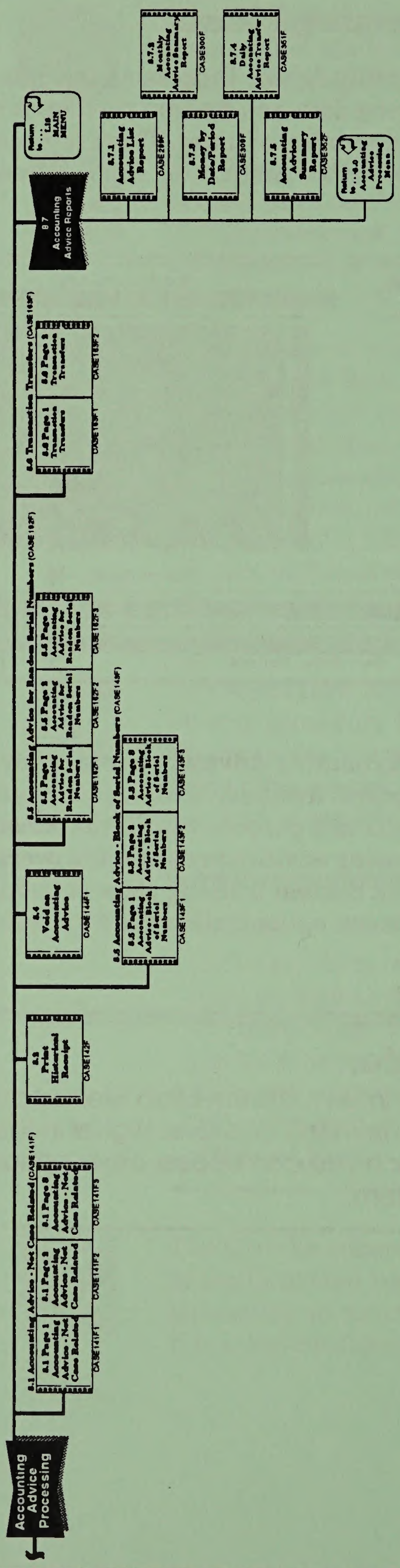
Prompt for and answer questions.

Accounting Advice Processing includes several tasks requiring data and System privileges restricted to a limited number of users. There are seven sections or options on the Accounting Advice Processing Menu:

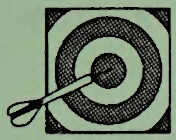
The Accounting Advice Processing Menu itself identifies the options available. Each menu option has its own function and purpose within the Accounting Advice Processing environment and the overall System. This Interim System training class presents an overview of each menu option and/or the form(s) accessible within them.

Note:

The Interim System Main Menu option returns you to the menu one level higher in the System, from which you can access other options in the Interim System.


Accounting Advice Processing
8.7 Accounting Advice Reports
Return to . . . LIS MAIN MENU
CASE142F
CASE144F1
CASE141F1
CASE141F2
CASE141F3
CASE143F1
CASE143F2
CASE143F3
CASE162F1
CASE162F2
CASE162F3
CASE163F1
CASE163F2
CASE300F
CASE351F

Accounting Advice - Not Case Related Form (CASE141F)



45 minutes
(Including Exercise F-1)

Review the purpose of the Accounting Advice - Not Case Related Form.

Purpose and use of Accounting Advice - Not Case Related Form:

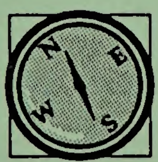
This form produces an accounting advice receipt without saving any information to a particular case in the System. This form should normally be used for general receipting purposes for such items as copying, computer time, etc.... The information entered on this form is stored only in the System's accounting table, not in the case action table since the information is not related to a particular case.

Emphasize that although this form is for accounting data unrelated to cases, monies that eventually will be redistributed to case(s) on the Transaction Transfers Form can be entered here.

NOTE:
Although this form is for entering accounting information unrelated to cases in the System, you may enter data on this form (and generate an accounting advice) for monies that eventually will be redistributed to case(s) using the Accounting Advice Transaction Transfers Form (CASE163F). Until CASE163F is used, however, monies entered on this form remain unrelated to cases.

Review who uses this form and why.

BLM personnel responsible for generating accounting advice receipts for transactions not related to existing cases in the Interim System use this form to perform their tasks.



Review navigation to this form (including QXFER).

Navigation to this form and use of CASE141F program name in QXFER:

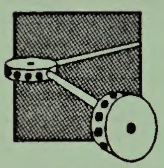
The Accounting Advice - Not Case Related Form (CASE141F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice - Not Case Related option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE141F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Date and Time of the accounting advice receipt (the current date and time are the defaults).

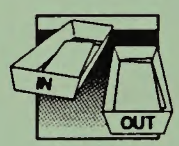
- Employee Initials (Alaska only).
- Date Received (i.e., the date receipted monies are actually received).
- Fund Code and Fund Symbol.
- How Many (i.e., the number of transactions pertaining to any one money record on the receipt).
- Money Amount.
- A decision whether or not to print an accounting advice receipt. If you choose to print a receipt, you must specify a destination printer ID.



Structure of the form:

Review this form's basic structure and the types of data that can be entered.

The Accounting Advice - Not Case Related Form consists of three pages. Page 1 contains fields that allow you to enter the date and time of the accounting advice, cashier number, method and date of payment, and data concerning the payment remitter. Page 2 contains fields that allow you to enter accounting advice remarks and money records containing fund code, fund symbol code, money type and money amount information. When you commit data entered on pages 1 and 2 to the database, fields on page 3 display the accounting advice number generated, and allow you to specify whether or not you want an accounting advice receipt printed.

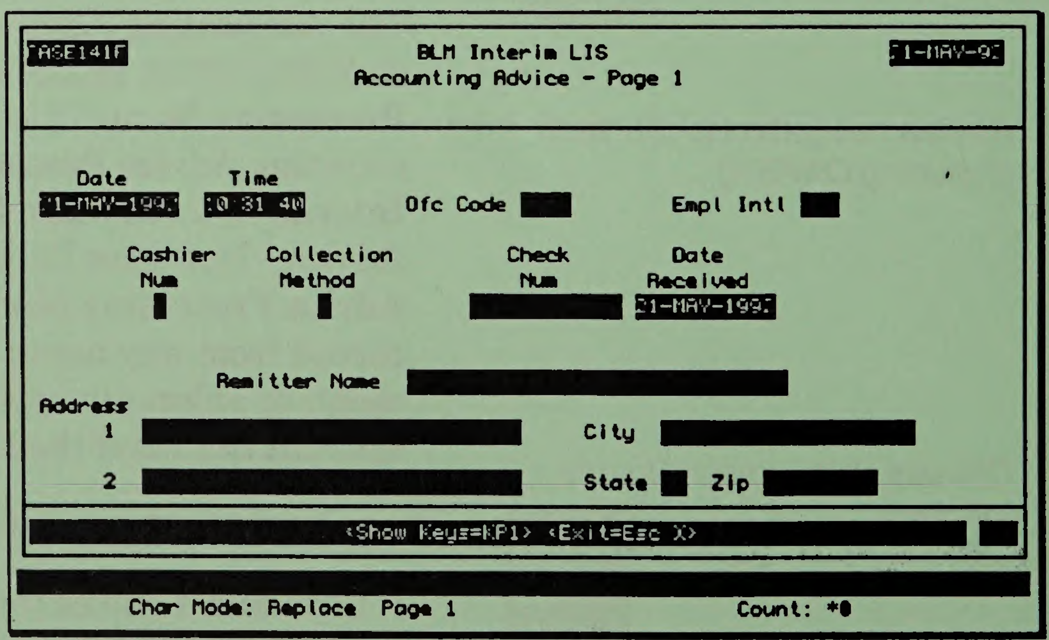


Workflow within this form and a review of the form's pages and fields:

Review the step-by-step workflow for the Accounting Advice - Not Case Related Form.

Use the available training aids as needed.

Use a BLM Receipt and Accounting Advice printed form as a reference.



STEP 1

On page 1 of the form, the mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. The value in the Date field is printed at the top of the accounting advice receipt as the date the receipt was created. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s). If you enter a time, the cursor automatically moves to the Office Code field when you enter the last digit in the Time field.

Demonstrate how to enter dates and times different from the defaults.

Enter your office code and initials or the office code and initials of the employee authorizing this accounting advice receipt. An office code is optional, and employee initials are required in Alaska.

Mention that employee initials are required in Alaska.

Discuss each of the remaining data elements on this page.

Demonstrate and discuss LOV where available.

Enter the optional cashier number that identifies a specific person bonded and authorized to perform cashier functions in the BLM state offices for the purpose of collecting, receiving and validating monies from the general public into the U.S. Treasury. Use the List of Values (LOV), if necessary.

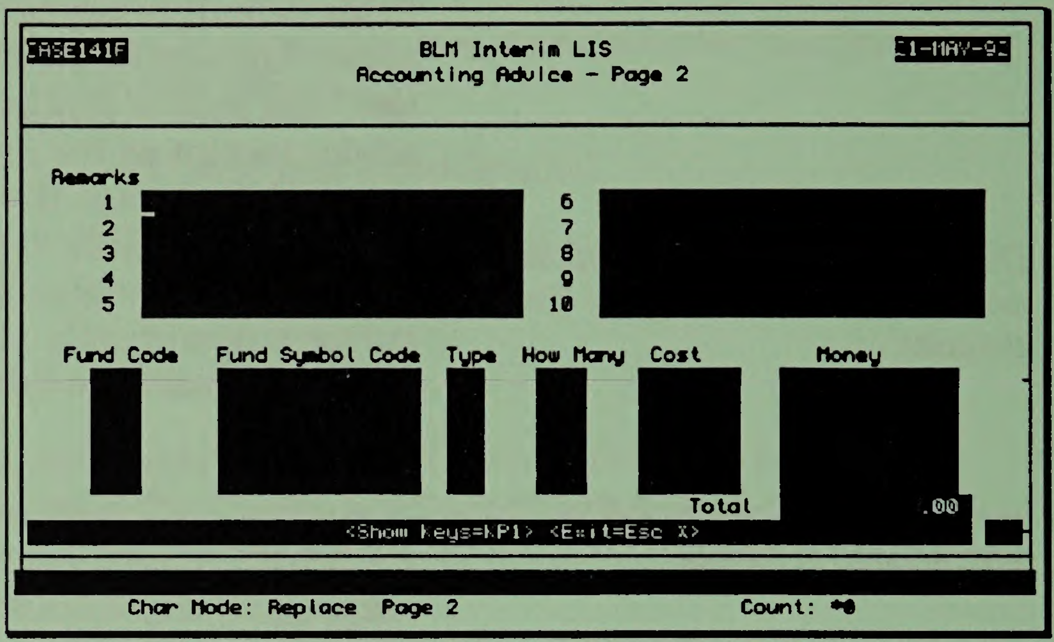
Enter the optional collection method code that identifies the type of payment used to receive monies from the public. Use the List of Values (LOV), if necessary. If the collection method is by check or money order, the cursor moves to the optional Check Number field so that you may enter a check number.

Emphasize that Date Received is required.

The mandatory Date Received field records the date monies are received by your office, and defaults to today's date. This date prints in the lower right corner of the receipt, next to employee initials. Either accept the default date or change it. If you enter a date, the cursor automatically moves to the Remitter Name field when you enter the last digit in the Date Received field.

Enter the optional remitter's name, address (use 2 lines, if necessary), city, state and zip code. Use the Lists of Values (LOV) available in the State and Zip Code fields, if necessary.

When you press NEXT FIELD in the Zip Code field, the cursor moves to page 2 of the form.



STEP 2

Emphasize where numbered marks entered on page 2 appear on a printed receipt, and that each line of remarks can relate to a specific fund code/ symbol on receipts.

The top section of page 2 contains ten optional 30-character fields for accounting advice remarks related to the fund codes/symbols appearing on the printed receipt or referencing other pertinent information to the accounting advice.

Enter any appropriate accounting advice remarks related to the fund codes and fund symbols to be entered for this accounting advice. There is no word wrap from one line of remarks to the next; you must press NEXT FIELD at the end of each line to continue to the next line.

Demonstrate using NEXT BLOCK to skip blank lines and move directly to the Fund Code field.

To move directly to the Fund Code field and skip any remaining lines of remarks, press NEXT BLOCK on a blank line in the Remarks field.

Refer to the BLM printed receipt form, and explain that the collection method (and check number), as well as office code and employee initials, are printed below remarks on the receipt.

NOTE:

The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the ten line(s) to use if you want a specific line of remarks to line up with a particular money line on the printed receipt. Accounting advice remarks print single spaced on the receipt. The collection method (and check number if appropriate) specified on page 1 of this form is printed automatically on the receipt below the ten lines of remarks you enter on page 2.

STEP 3

Thoroughly review and demonstrate entering money records on page 2, and discuss the data that can be entered in each field.

Mention that more than five money records can be entered.

Discuss the relationship between fund codes and symbols, emphasizing that the System forces their values to be compatible.

The bottom portion of page 2 allows you to enter money records for this accounting advice receipt. For each money record displayed on this form you may enter a fund code, fund symbol, money type, how many (i.e., the number of transactions pertaining to the money record on the receipt), cost per transaction and money amount.

More than the five visible records in this portion of page 2 can be added to an accounting advice; as you add additional money records in this portion of page 2, previously entered records scroll out of view. Use the appropriate function keys to scroll through these money records.

The Fund Code and Fund Symbol fields are mandatory, and their values are directly dependent upon and determined by each other. You only need to enter a value in one of these fields since the other is filled automatically with the correct, corresponding value. If you enter a fund code, the Fund Symbol field fills and the cursor moves to the Money Type field. If you skip the Fund Code field, you must enter a Fund Symbol; when you enter this value, the Fund Code field fills and the cursor moves to the Money Type field.

Enter either a fund code or fund symbol for the current money record; both the Fund Code and Fund Symbol fields fill with compatible values. Use the List of Values (LOV) available in both fields, if necessary.

NOTE:

If you move back into either one of these two fields and enter a new value, the System automatically overwrites the value in the other field so that it corresponds to the value you entered. The System always compares the values in these two fields, and insures that they correspond to one another.

Enter the optional money type abbreviation for the money involved in this transaction (e.g., filing fee, bid amount, etc...). Use the List of Values (LOV), if necessary.

Demonstrate and discuss the relationships among the How Many, Cost and Money Amount fields.

Emphasize that values entered in the required How Many field and optional Cost field are not saved in the System.

Values entered in the mandatory How Many field and the optional Cost field are multiplied by the System to calculate money amount; the multiplication of these fields is provided as a convenience for calculating the value for the Money Amount field. The numbers entered in the How Many and Cost fields are not saved in the database.

Enter the number of transactions involved in the current money record in the How Many field (e.g., 5 copies made, 3 filing fees received). In the Cost field, you may enter the cost for one of the items identified in the How Many field. If the cost per item is a whole number, you do not need to enter a decimal point and cents.

Emphasize that a money amount is required and that automatically calculated money amounts may be overwritten.

Mention that a decimal point and cents do not need to be entered if the money amount is a whole dollar number.

When you move to the mandatory Money Amount field with values in both the How Many and Cost fields, the System multiplies these values and enters the result in the Money Amount field. If necessary, you may overwrite this calculated value. If you did not enter a value in the Cost field, no multiplication is performed, and the Money Amount field is blank; enter the amount of money received or refunded by the BLM in the transactions recorded in this money record. If the money amount is a whole number, you do not need to enter a decimal point and cents. The System will print the amount entered in the Money Amount field on the receipt.

NOTE:

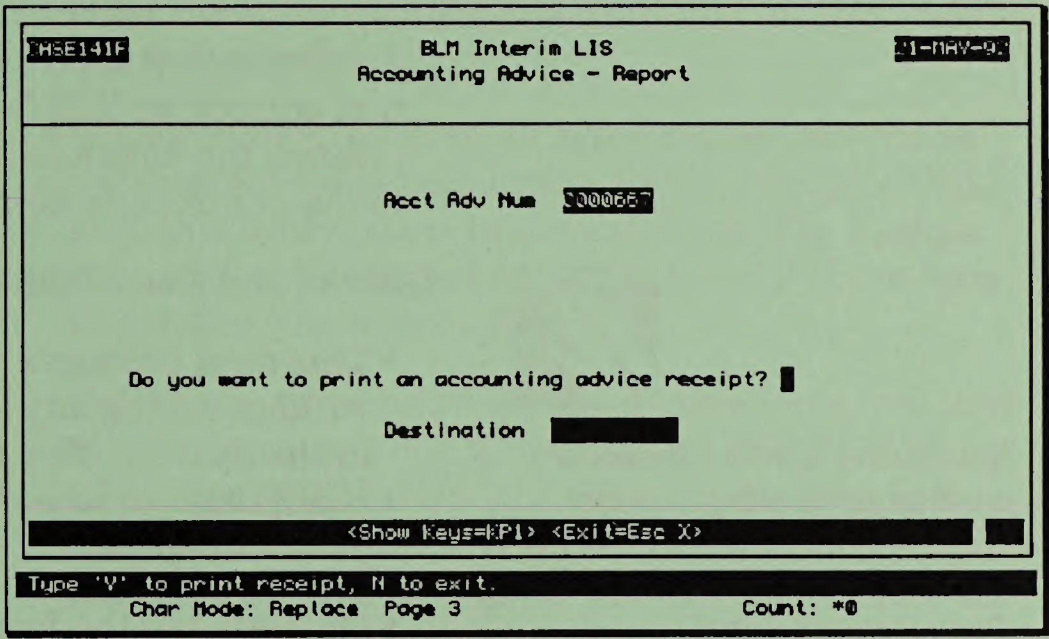
Values entered in the How Many and Cost fields are not saved in the database when you commit accounting advice data. These fields are provided for simple multiplication in calculating the money amount. The money amount calculated using the How Many and Cost values can be overwritten. When this is done, values in the How Many and Cost fields are not automatically changed to correspond to the new overwritten money amount.

Explain that the Total field displays a running total for all monies entered on this form.

At the bottom right of page 2 is the Total field. This field is not accessible, and displays the running total of all the money transactions entered for this receipt for your benefit. The total money amount for the accounting advice will be printed on the receipt.

Emphasize that COMMIT must be pressed to save data in the System, generate an accounting advice number, move to Page 3 of this form and print a receipt.

Once you have entered as many money records as necessary for this accounting advice receipt, COMMIT this information to the database. The System saves the data entered on pages 1 and 2 of the form and moves you to page 3.



STEP 4

Demonstrate what happens after COMMIT is pressed, including the generation of an accounting advice number.

After you commit data on pages 1 and 2 to the database, page 3 of this form displays the System-generated accounting advice number assigned to this receipt and associated with each money record entered.

Demonstrate and discuss how to return to pages one and two of the form to make changes before exiting or printing a receipt. Mention that most fields on Page 1 are locked to changes and that COMMIT must be pressed again to save altered values.

NOTE:

Before you print a receipt or exit this form, you may return to pages 1 and 2 by pressing PREVIOUS FIELD or PREVIOUS BLOCK to update the information you entered. While you may update any of the existing data on page 2, you can only update the Date Received field on page 1; all other fields on page 1 are locked to updates. To save changes you make on pages 1 and 2, press COMMIT and return automatically to page 3.

Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Do You Want To Print An Accounting Advice Receipt? Enter a **Y** to print the receipt or an **N** to exit the form. If you enter a **Y**, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records
```

An accounting advice receipt containing the information entered on this form is printed on the specified printer, the form's fields clear, and the cursor returns to the Office Code field on page 1 of this form.

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Accounting Advice - Not Case Related Form.

Quirks and special data issues for CASE141F:

- This form produces an accounting advice receipt without saving any information to a particular case in the System. This form should be used for general receipting purposes for such items as copying, computer time, etc....
- On page 1 of the form, the mandatory Date and Time fields default to the current date and time. To change these defaults, use PREVIOUS FIELD and replace the values. If you enter a time, the cursor automatically moves to the Office Code field when you enter the last digit in the Time field.
- The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the ten line(s) to use if you want a specific line of remarks to line up with a particular money line on the printed receipt. The collection method (and check number if appropriate) specified on the form is printed automatically on the receipt below the ten lines of accounting advice remarks.
- The Fund Code and Fund Symbol fields are mandatory, and their values are directly dependent upon and determined by each other. You only need to

enter a value in one of these fields since the other is filled automatically with the correct, corresponding value.

- Values entered in the How Many and Cost fields are not saved in the database when you commit accounting advice data. These fields are provided for simple multiplication in calculating the money amount. The money amount calculated using the How Many and Cost values can be overwritten.

- At the bottom right of page 2 is the Total field. This field is not accessible, and displays the running total of all the money transactions entered for this receipt for your benefit.

- Once you have entered as many money records as necessary for this accounting advice receipt, COMMIT this information to the database. The System saves the data entered on pages 1 and 2 of the form and moves you to page 3.

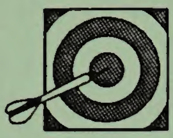
- Before you print a receipt or exit this form, you may return to pages 1 and 2 by pressing PREVIOUS FIELD or PREVIOUS BLOCK to update the information you entered. While you may update any of the existing data on page 2, you can only update the Date Received field on page 1; all other fields on page 1 are locked to updates. To save changes you make on pages 1 and 2, press COMMIT and return automatically to page 3.

- When you press NEXT FIELD with a valid printer ID in the Destination field, an accounting advice receipt containing the data entered on this form is printed on the specified printer, and a message concerning the print job appears on the message line.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise F-1** (Accounting Advice - Not Case Related).*

Print Historical Accounting Advice Form (CASE142F)



10 minutes

Review the purpose of the Print Historical Accounting Advice form. Emphasize that `HISTORICAL` *is printed on all receipts generated with this form.*

Purpose and use of Print Historical Accounting Advice Form:

This form allows you to reprint an existing accounting advice receipt. The reprinted receipt displays `HISTORICAL` in the upper left rather than `ORIGINAL`.

When you enter the accounting advice number of the receipt you want to reprint, customer, remitter and accounting data for that receipt appear in the appropriate fields; this information is displayed simply for your verification, and you may not access or alter any accounting advice data on this form.

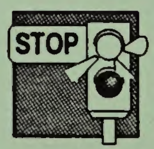
Review who uses this form and why.

BLM personnel responsible for reprinting copies of existing accounting advice receipts use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE142F program name in QXFER:

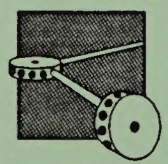
The Print Historical Accounting Advice Form (CASE142F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Print Historical Accounting Advice option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE142F program name.



Discuss data required to use this form and the minimum data required.

Required Data you must have to use this form:

- Accounting Advice Number (this number must exist and be associated with accounting information).
- A decision whether or not to print an historical copy of the accounting advice. If you choose to print an historical receipt, you must specify a destination printer ID.

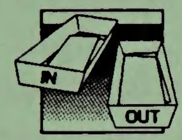


Review this form's basic structure and the types of data that can be entered, retrieved and printed.

Structure of the form:

The Print Historical Accounting Advice Form consists of one page containing fields that allow you to specify the accounting advice number of the receipt you want reprinted, verify accounting data associated with the

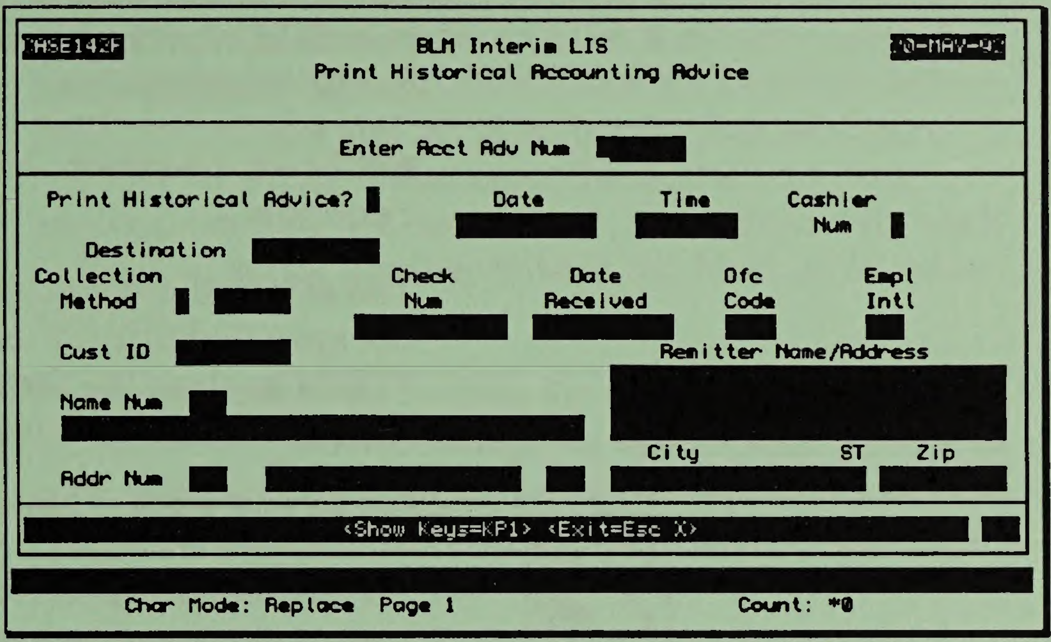
specified number, verify your wish to print an historical receipt and specify the printer on which to print the receipt.



Review the step-by-step workflow for the Print Historical Accounting Advice form.

Use the available training aids as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Emphasize that you must have an existing accounting advice number to use this form.

Enter the accounting advice number that identifies the receipt you want reprinted. This advice number must exist and be associated with accounting data.

When you enter a valid accounting advice number and move to the Print Historical Advice? field, information concerning the specified advice appears in the Date, Time, Cashier Number, Collection Method, Check Number, Date Received, Office Code, Employee Initials, Customer ID, Name Number, Address Number and Remitter Name/Address fields. The information in these fields appears for reference purposes and correct receipt verification. You may not access these fields on this form.

Emphasize that only three fields are accessible on this form and that all other simply display data for verification purposes.

NOTE:
Only the Enter Accounting Advice Number, Print Historical Advice? and Destination fields are accessible on this form. All other fields cannot be accessed and simply display accounting advice information so you can verify that you are reprinting the correct receipt.

STEP 2

Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Print Historical Advice? Enter a **Y** to reprint the receipt or an **N** to return to the Enter Accounting Advice Number field at the top of the page. If you enter a **Y**, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records
```

The selected accounting advice receipt is reprinted on the specified printer. EXIT the form, or press CLEAR FORM to clear the form's fields and return to the Enter Accounting Advice Number field.

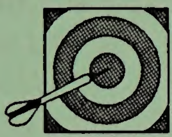
Review the Quirks subsection point by point with the class and briefly summarize the use of the Print Historical Receipt Form.

Quirks and special data issues for CASE142F:

- The accounting advice number entered on this form must exist and be associated with accounting information in the System.
- Only the Enter Accounting Advice Number, Print Historical Advice? and Destination fields are accessible on this form. All other fields cannot be accessed and simply display accounting advice information so you can verify that you are reprinting the correct receipt.
- When you press NEXT FIELD with a valid printer ID in the Destination field, the selected accounting advice receipt is reprinted on the specified printer, and a message concerning the print job appears on the message line.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Accounting Advice - Block of Serial Numbers Form (CASE143F)



1 hour
(Including Exercise F-2)

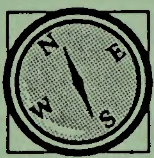
Review the purpose of the Accounting Advice - Block of Serial Numbers form.

Purpose and use of Accounting Advice - Block of Serial Numbers Form:

This form allows you to enter accounting advice and money action information related to cases in one or more blocks of case serial numbers, all accounted for on a single accounting advice receipt. In using this form, you create and print an accounting advice receipt by entering action record(s) and accounting advice data that are, as a whole, associated with each individual serial number within the block(s) of cases specified.

Review who uses this form and why.

BLM personnel responsible for creating and printing an accounting advice receipt for one or more blocks of case serial number, as well as entering money action record information for these serial numbers use this form to perform their tasks.



Review navigation to this form (including QXFER).

Navigation to this form and use of CASE143F program name in QXFER:

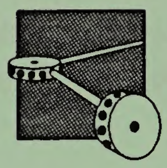
The Accounting Advice - Block of Serial Numbers Form (CASE143F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice - Block of Serial Nums option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE143F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- A range of Case Serial Numbers.
- Date of the accounting advice receipt (the current date is the default).
- Employee Initials (Alaska only).
- Date Received (i.e., the date receipted monies are actually received).
- Customer ID.
- Action Code.

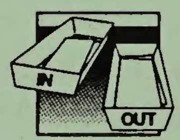
- Action Date (the date entered in the Date Received field is the default).
- Fund Symbol (required only for money action records).
- Money Amount (required only for money action records).
- A decision whether or not to print an accounting advice receipt. If you choose to print a receipt, you must specify a destination printer ID.



Review this form's basic structure and the types of data that can be entered, retrieved and printed.

Structure of the form:

The Accounting Advice - Block of Serial Numbers Form consists of three pages. Page 1 contains fields that allow you to enter one or more blocks of serial numbers, date and time of the accounting advice, office code and initials of the employee authorizing this receipt, cashier number, method and date of payment, data concerning a customer common to all specified cases, and data concerning the payment remitter. Page 2 contains fields that allow you to enter accounting advice remarks, as well as accounting advice and money action records for each of the valid, unvoided cases within the specified range(s) of case serial numbers. When you commit data entered on pages 1 and 2 to the database, fields on page 3 display the accounting advice number generated, and allow you to specify whether or not you want an accounting advice receipt printed.

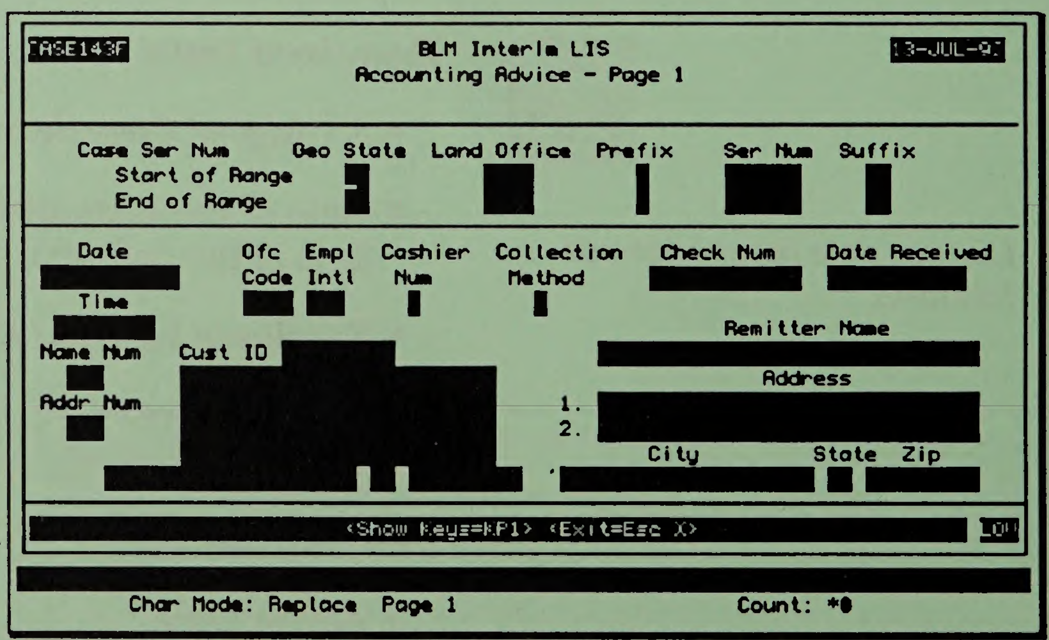


Review the step-by-step workflow for the Accounting Advice -Block of Serial Numbers form.

Use the available training aids as needed.

Use a printed BLM Accounting Advice Receipt for reference.

Workflow within this form and a review of the form's pages and fields:



STEP 1

Thoroughly review the use of the range of serial numbers block at the top of page 1. Emphasize that multiple blocks of cases can be specified, but that all cases must have the same case type and a common customer.

Multiple blocks (i.e., ranges) of case serial numbers may be specified in the scrollable group of fields in the block at the top of page 1. One range of numbers is specified at a time, and NEXT/PREVIOUS RECORD allows you to scroll from one range's starting and ending serial numbers to another's. Regardless of how many ranges are entered, all cases falling within the specified ranges must be of the same case type and must be associated with a common customer ID in the System.

NOTE:

The restriction concerning a common case type does not apply as long as all cases within the specified ranges are mining claims (case type 384xxx).

Mention that the restriction to a single case type does not apply to mining claims case types.

Demonstrate and discuss LOV where available.

Mention that voided and invalid numbers may be within the range, but cannot be entered as the start or end of the range. Also mention that such cases are automatically skipped during processing.

Enter valid, unvoided case serial numbers specifying the start and end of a range of cases in the block of fields at the top of page 1. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Voided and invalid serial numbers can fall within specified ranges; such numbers or cases are skipped automatically during processing, and no money actions or accounting advice data are associated with these serial numbers.

Demonstrate and discuss what happens as the values for a range of case serial numbers is entered.

Once a Start of Range serial number is entered, the System displays its case type in the inaccessible field to the right of the serial number range. In addition, the End of Range fields automatically fill with the Start of Range values. The Geographic State and Land Office fields of the End of Range are inaccessible. Accept the End of Range serial number default if you wish to specify a single case, or enter the ending number for a range.

Once values for a range of serial numbers meeting the requirements of this form are entered, you may begin entering accounting advice data for the receipt or press enter another range of serial numbers.

Review the process of adding another range of cases in this block. Remind students of the criteria all case must meet.

To enter another range of case serial numbers, press NEXT RECORD in any field of the block. The block's fields clear, and you may enter serial numbers specifying the start and end of another range. Remember

that the cases within all ranges entered on this form must be of the same case type and must contain a common customer ID.

Demonstrate how to move to the lower block on Page 1. Mention that the range block can be reaccessed at any time before COMMIT.

To begin entering accounting advice data, press NEXT BLOCK in any field of the block, or NEXT FIELD in the End of Range Serial Number or Suffix field. The cursor moves into the lower block on page 1.

NOTE:

You may return to the block at the top of page 1 using PREVIOUS BLOCK or PREVIOUS FIELD at any time before pressing COMMIT. Additional blocks of serial numbers may be specified, and previously entered values may be changed or deleted.

STEP 2

Emphasize that the first customer in the first specified case within the block(s) common to all selected cases is automatically placed on Page 1.

When the lower block on page 1 is accessed, the first customer ID in the first specified case within the block(s) common to all selected cases appears in the Customer ID field. Also, the name number (and name) and address number (and address) associated with this ID in the first specified case appear in the appropriate fields.

Demonstrate how to enter dates and times different from the defaults.

The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. The value in the Date field is printed at the top of the accounting advice receipt as the date the receipt was created. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).

Enter your office code and initials or the office code and initials of the employee authorizing this accounting advice receipt.

NOTE:

Employee initials are required in Alaska.

Mention that employee initials are required in Alaska.

Enter the optional cashier number that identifies a specific person bonded and authorized to perform cashier functions in the BLM state offices for the

Discuss each of the remaining data elements on page 1.

purpose of collecting, receiving and validating monies from the general public into the U.S. Treasury. Use the List of Values (LOV), if necessary.

Enter the optional collection method code that identifies the type of payment used to receive monies from the public. Use the List of Values (LOV), if necessary. If the collection method is by check or money order, the cursor moves to the optional Check Number field so that you may enter a check number.

Emphasize that Date Received is required.

The mandatory Date Received field records the date monies are received by your office, and defaults to today's date. This date prints in the lower right corner of the receipt, next to employee initials. Either accept the default date or change it.

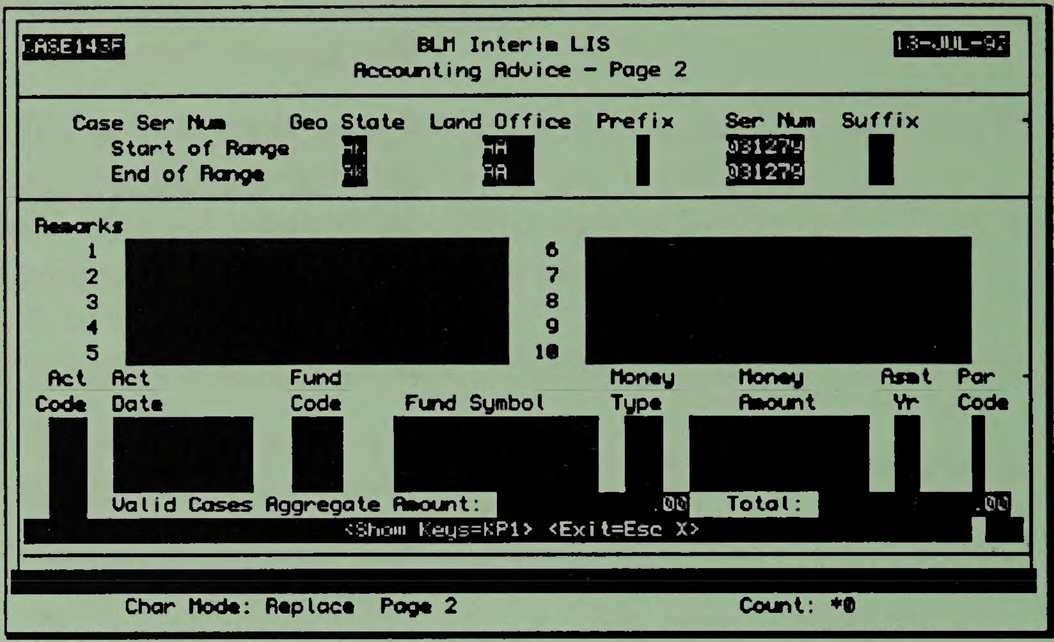
Demonstrate and explain how to change customer data automatically placed on Page 1. Emphasize which customer ID's, name numbers and address numbers can be entered.

The required Customer ID field and the optional Name and Address Number fields are skipped, and the cursor moves to the Remitter Name field. Use PREVIOUS FIELD to move back to the Customer fields, as needed. You may replace or delete values in the Address and Name Number fields, and replace the Customer ID; the Name and Address fields are for display only and cannot be accessed. There are no Lists of Values (LOV) available in the Customer fields.

NOTE:
If you change the customer ID automatically placed in the Customer ID field, the new ID must be for a customer common to all the cases within the specified block(s). If you change the name and address numbers automatically placed on this form, they must exist within the selected customer ID, but do not have to be the numbers associated with the ID in the first specified case within the block(s).

Enter the optional remitter's name, address (use 2 lines, if necessary), city, state and zip code if they are different from the displayed customer data. Use the Lists of Values (LOV) available in the State and Zip Code fields, if necessary.

When you press NEXT FIELD in the Zip Code field, the cursor moves to page 2 of the form.



STEP 3

Explain where numbered remarks entered on Page 2 appear on a printed receipt and that each line of remarks can relate to a specific fund code/ symbol on receipts.

At the top of page 2 are ten optional 30-character fields for accounting advice remarks related to the fund codes/symbols appearing on the printed receipt or referencing other pertinent information to this accounting advice.

Enter any appropriate accounting advice remarks related to the fund codes and symbols to be entered for this receipt. There is no word wrap from one line of remarks to the next; you must press NEXT FIELD at the end of each line.

Demonstrate using NEXT BLOCK to skip blank lines and move directly to the Action Code field.

To skip any remaining lines of remarks and move directly to the Action Code field in the first record at the bottom of the page, press NEXT BLOCK on a blank line in the Remarks field.

Refer to a BLM printed receipt form and explain that the collection method (and check number), as well as office code and employee initials, are printed below remarks on the receipt.

NOTE:

The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the ten line(s) to use if you want a specific line of remarks to line up with a particular money line on the receipt. Remarks print single spaced on the first page of the receipt. The collection method (and check number if appropriate) specified on page 1 of this form is printed automatically on the first page of the receipt below the lines of remarks entered on page 2.

STEP 4

Thoroughly review and demonstrate entering action and accounting advice data on Page 2 and discuss the information that can be entered in each field.

Emphasize that all actions entered are added to all cases within the specified range as entered on Page 1.

The bottom portion of page 2 allows you to enter action data and accounting advice information for this accounting advice receipt. For each action/accounting advice record displayed on page 2, you may enter an action code, action date, fund code, fund symbol, money type, money amount, assessment year and parcel code. Depending on the case type and action code, some fields may be inaccessible or skipped automatically. When you print this receipt, the information in each record in this portion of page 2 is used to create both an action record in each case within the specified block(s) and accounting advice records in the System.

Mention that four records can be entered.

More than the four displayed records can be added to this accounting advice; as you add additional records in this portion of page 2, previously entered records scroll out of view. Use the appropriate function keys to scroll through these records.

Emphasize that action codes are case type sensitive.

Enter the mandatory action code (associated with the money transaction referenced in this record) for the action record to be added to the specified case. Only certain action codes are valid for each case type. Use the List of Values (LOV), if necessary.

Emphasize that refund money action codes are not allowed and that refund actions must be entered on CASE163F.

NOTE:
Refund money action codes are not accepted on this form. Refunds should be handled on the Accounting Advice Transaction Transfers Form (CASE163F).

Mention that the required action date can be changed from the default.

The mandatory Action Date field defaults to the date entered in the Date Received field on page 1 when you press NEXT FIELD in the Action Code field. Cursor movement beyond the Action Code field is determined by whether the action code entered is for a money action or a non-money action.

Demonstrate and discuss how cursor movement beyond the Code field is determined by case type and whether the action is a money or non-money action.

If the action code entered is for a non-money action, the cursor skips to the Assessment Year field. To change the action date, use PREVIOUS FIELD, return to the Action Date field, and replace the value.

If the action code entered is for a money action, the Fund Code, Fund Symbol and Money Type fields may fill automatically with default values pulled from the

Explain how accounting advice data may be pulled from the case type/action code validation table.

case type/action code validation table. When a default value is placed in a field, the field is skipped automatically; use PREVIOUS FIELD to return to the field to replace the default value. After defaults are placed in the appropriate fields, the cursor stops in the first blank field encountered, moving to the right from the Action Date field.

Discuss the relationship between fund codes and symbols, emphasizing that the System forces their values to be compatible.

Enter the optional fund code, if necessary. Use the List of Values (LOV), if needed. If you enter a fund code or select one from the List of Values, the Fund Symbol field fills with a default value from the validation table corresponding to the entered fund code.

*Emphasize that fund codes/symbols taken from the case type/action code LOV can be changed. Validation is with the fund code/symbol table, **not** the case type/action table.*

Enter the mandatory fund symbol (if necessary), accept the default, or overwrite the default value. Use the List of Values (LOV), if needed. If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table, and the cursor moves to the Money Type field. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

Enter the optional money type abbreviation for the money involved in this transaction (e.g., filing fee, bid amount, etc...). This code should be related directly to the action in the record. Use the List of Values (LOV), if necessary.

Emphasize that a money amount is required and that if the dollar value is a whole number the decimal point and cents do not need to be entered.

Enter the mandatory money amount for the money received by the BLM in the transaction reflected in this money action/accounting advice record. If the money amount is a whole number, you do not need to enter a decimal point and cents. If you press NEXT FIELD without entering a value, `0.00` is placed automatically in this field.

Emphasize that Assessment Year is only for certain actions in mining claims cases.

Enter the optional assessment year (i.e., the last two digits of the year in which assessment work was performed for the case's mining claim), if appropriate. Although this field is accessible for all case types, values should be entered only for mining claim cases.

Mention the parcel code is only accessible for Alaska native Allotment cases.

For Alaska Native Allotment cases only, the cursor moves to the Parcel Code field when you press NEXT FIELD in the Assessment Year field. Enter the parcel

code, if appropriate, that identifies the land in the case affected by the current money action/accounting advice record.

When you press NEXT FIELD in the Assessment Year field for all case types other than Alaska Native Allotments (or when you press NEXT FIELD in the Parcel Code field for Alaska Native Allotment cases), the following message appears in the message line:

```
Press commit to save, next field to con-
tinue entering records.
```

Emphasize that COMMIT must be pressed to save data in the System, generate an accounting advice number, move to Page 3, and print a receipt.

Press COMMIT to save the action and accounting advice data entered on pages 1 and 2 for this accounting advice receipt and for each individual case within the specified range(s); the cursor moves to page 3 of this form.

Mention the use of DUPLICATE RECORD to save having to repeatedly enter the same data.

Press NEXT FIELD, NEXT RECORD or CREATE RECORD to move to the Action Code field in the next record in this section of page 2. On any new record, you may use DUPLICATE RECORD if values in the new record are similar to values in the previous record.

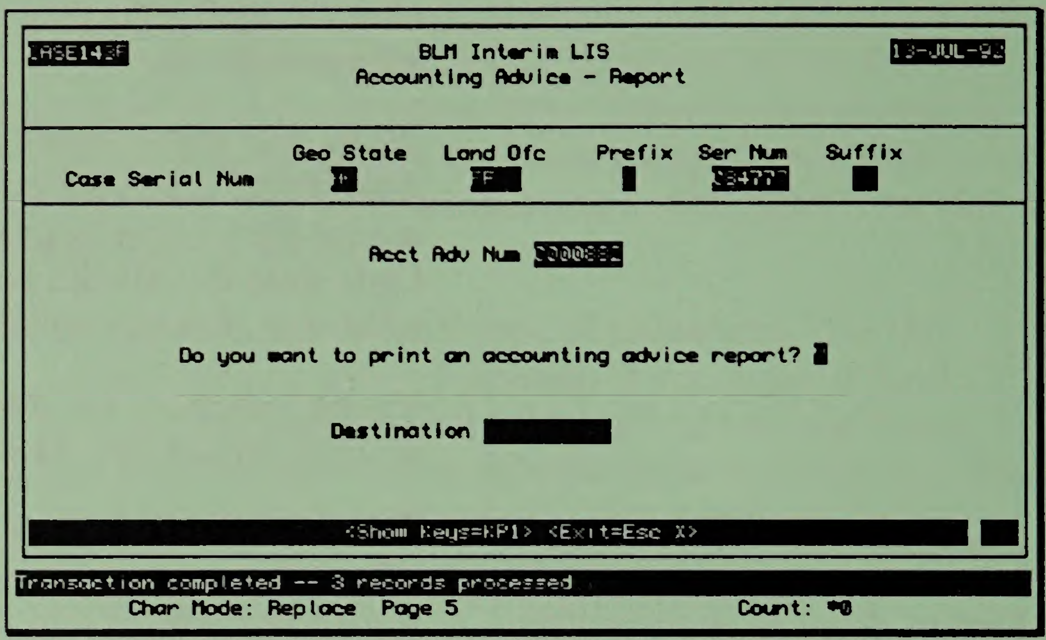
Explain the values listed in the three fields at the bottom of Page 2.

NOTE:
At the bottom of page 2 are three inaccessible fields. The unlabelled field at the bottom left of the page displays the number of valid, unvoided cases within the range(s) specified on page 1. The Valid Cases Aggregate Amount field displays a running sum total of the amount of money entered on this form for all valid cases. The Total field at the bottom right of the page displays a running total of the amount of money entered for each individual case within the specified range(s). The aggregate amount for all selected cases will be printed on the receipt.

STEP 5

Describe what happens after COMMIT is pressed, including processing messages and the generation of an accounting advice number.

After you COMMIT information on pages 1 and 2 to the database and move to page 3, a message appears indicating which of the block(s) entered on page 1 is being processed. When processing is complete, the advice number associated with the action and accounting advice receipt data just committed is displayed in the Accounting Advice Number field.



Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Do You Want To Print An Accounting Advice Report? Enter a `Y` to print a receipt or an `N` to exit the form. If you enter a `Y`, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records
Press any function key to acknowledge
message
```

This message indicates that an accounting advice receipt containing the information entered on this form is being printed on the specified printer. When you acknowledge the message, you exit this form.

Review the Quirks subsection point by point with the class and briefly summarize the use of the Accounting Advice - Block of Serial Numbers Form.

Quirks and special data issues for CASE143F:

- This form allows you to enter accounting advice and money action information related to one or more blocks of case serial numbers, all accounted for on a single accounting advice receipt.
- Multiple blocks (i.e., ranges) of case serial numbers may be specified in the scrollable group of fields in the block at the top of page 1. One range of numbers

is specified at a time, and NEXT/PREVIOUS RECORD allows you to scroll from one range's starting and ending serial numbers to another's.

- Regardless of how many ranges are entered, all cases falling within the specified ranges must be of the same case type and must be associated with a common customer ID in the System. The restriction concerning a common case type does not apply as long as all cases within the specified ranges are mining claims (case type 384xxx).

- Voided and invalid serial numbers can fall within specified ranges; such numbers or cases are skipped automatically during processing.

- You may return to the block at the top of page 1 using PREVIOUS BLOCK or PREVIOUS FIELD at any time before pressing COMMIT. Additional blocks of serial numbers may be specified, and previously entered values may be changed or deleted.

- The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).

- When the lower block on page 1 is accessed, the first customer ID in the first specified case within the block(s) common to all selected cases appears in the Customer ID field. Also, the name number (and name) and address number (and address) associated with this ID in the first specified case appear in the appropriate fields. Use PREVIOUS FIELD to move back to the Customer fields, overwriting or deleting values, if necessary. There are no Lists of Values (LOV) available in the Customer fields. If you change the customer ID, the new ID must be for a customer common to all the cases within the specified block(s).

- The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the ten line(s) to use if you want a specific line of remarks to line

up with a particular money line on the receipt. Remarks print single spaced on the first page of the receipt.

- Refund money action codes are not accepted on this form. Authorizing refunds should be handled on the Accounting Advice Transfer Form (CASE163F).

- Cursor movement beyond the Action Code field at the bottom of page 2 is determined by whether the action code entered is for a money action or a non-money action. If a non-money action code is entered, the cursor skips to the Assessment Year field. If a money action code is entered, the Fund Code, Fund Symbol and Money Type fields may fill automatically with default values pulled from the case type/action code validation table. If a default value is placed in a field, the field is skipped automatically, and the cursor stops in the first blank field encountered, moving to the right from the Action Date field.

- If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

- Although the Assessment Year field is accessible for all case types, values should be entered only for mining claim cases.

- At the bottom of page 2 are three inaccessible fields. The unlabelled field at the bottom left of the page displays the number of valid, unvoided cases within the range(s) specified on page 1. The Valid Cases Aggregate Amount field displays a running sum total of the amount of money entered on this form for all valid cases. The Total field at the bottom right of the page displays a running total of the amount of money entered for each individual case within the specified range(s). The aggregate amount for all selected cases will be printed on the receipt.

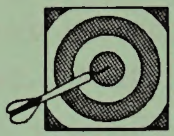
- Once you have entered as many action/accounting advice records as necessary for this receipt, COMMIT this information to the database. The System saves the data entered on pages 1 and 2 of the form and moves you to page 3.

- When you press NEXT FIELD with a valid printer ID in the Destination field, an accounting advice receipt containing the data entered on this form is printed on the specified printer, and a message concerning the print job appears on the message line.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise F-2** (Accounting Advice - Block of Serial Numbers).*

Void an Accounting Advice Form (CASE144F)



Purpose and use of Void an Accounting Advice Form:

10 minutes

Review the purpose of the Void an Accounting Advice form, emphasizing that an advice can only be voided on the same business day that it was created.

NOTE:

You may only void an accounting advice during the same business day on which it was created. You may not void accounting advices generated yesterday or earlier. To authorize refunds from an existing accounting advice, use the Accounting Advice Transaction Transfers Form (CASE163F).

This form allows you to void an existing accounting advice receipt generated today. When you enter the accounting advice number of the receipt you want to void, customer, remitter and accounting data for that receipt appear in the appropriate fields. These data are displayed so you can verify the accounting advice prior to voiding it; you may not access or alter any accounting data on this form.

Emphasize that all case money actions in the System that contain a voided accounting advice number are deleted. also explain that, while accounting data is retained, the status of the accounting advice number is changed to void.

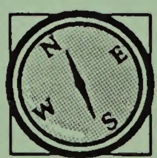
Voiding an accounting advice deletes any money action records that contain the accounting advice number from all case(s) in the System. Although the accounting advice number remains active in the System, its status is changed to void; all accounting information associated with the voided number is retained in the System.

Mention that a receipt labeled `VOID` *is printed.*

Once an accounting advice is voided, a copy of the original receipt is printed with `VOID` appearing in the upper left corner of the copy. This printed receipt contains the case serial numbers (if any), accounting advice remarks and original money amounts (as negative values) associated with the voided accounting advice.

Review who uses this form and why.

BLM personnel responsible for voiding accounting advice receipts and deleting associated action data in existing cases use this form to perform their tasks.

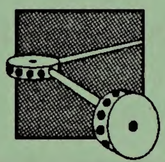


Review navigation to this form (including QXFER).

Navigation to this form and use of CASE144F program name in QXFER:

The Void an Accounting Advice Form (CASE144F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice

Discuss data required to use this form.



Review this form's basic structure and the types of data that can be entered, retrieved and voided.

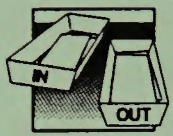
Processing Menu option from the Interim System Main Menu, then the Void an Accounting Advice option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE144F program name.

Required Data you must have to use this form:

- Office Code (if entered for the original receipt) and Employee Initials matching those on the Accounting Advice Receipt to be voided.
- Accounting Advice Number (this number must exist and be associated with accounting information).
- A decision whether or not to void an accounting advice. If you choose to void an accounting advice, you must specify a destination printer ID for the voided receipt printed by this form.

Structure of the form:

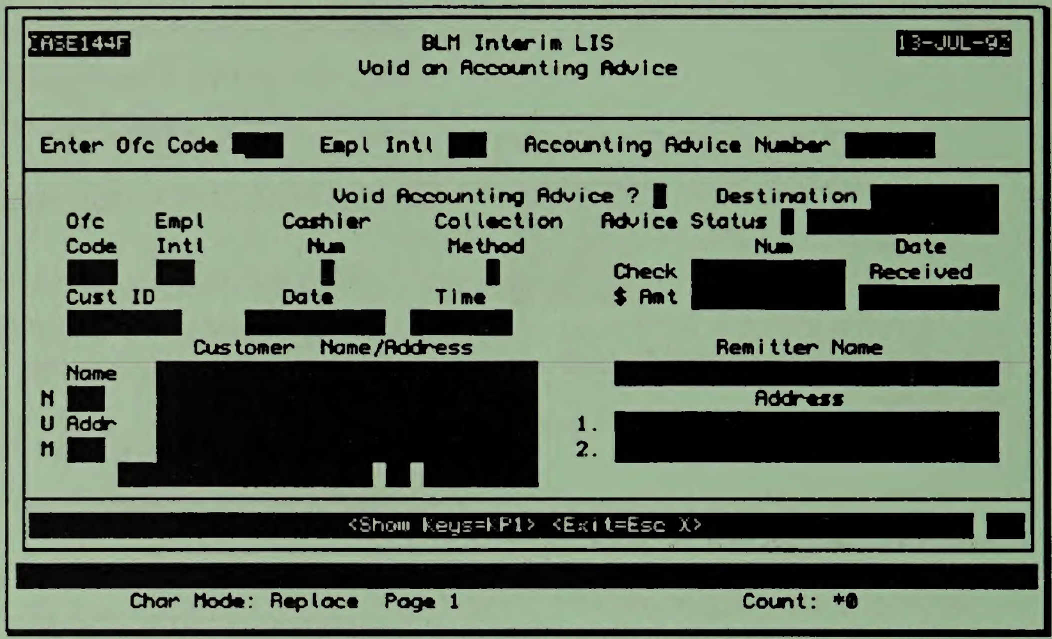
The Void an Accounting Advice Form consists of one page containing fields that allow you to specify the office code and employee initials on the receipt you want to void, specify the accounting advice number of the receipt, view for verification purposes the accounting data associated with this receipt, verify your wish to void the advice, and specify the printer on which to print the voided receipt.



Workflow within this form and a review of the form's pages and fields:

Review the step-by-step workflow for the Void an Accounting Advice form.

Use the available training aids as needed.



IA3E144F BLM Interim LIS 13-JUL-92
Void an Accounting Advice

Enter Ofc Code Empl Intl Accounting Advice Number

Void Accounting Advice ? Destination
Ofc Code | Empl Intl | Cashier Num | Collection Method | Advice Status
Num | Date Received
Check $ Amt
Cust ID | Date | Time
Customer Name/Address | Remitter Name
Name
N
U Addr
M
Address
1.
2.

<Show Keys=PF1> <Exit=Esc X>

Char Mode: Replace Page 1 Count: *0

STEP 1

Enter the office code and employee initials that exactly match those on the accounting advice receipt you want to void.

Emphasize that the office code and employee initials entered on this form must exactly match those on the receipt to be voided.

NOTE:

You may not void and accounting advice unless the office code and employee initials entered on this form exactly match (including blank spaces) the office code (if present) and employee initials on the receipt you want to void.

Emphasize that you must have an existing accounting advice number generated today to use this form.

Enter the accounting advice number that identifies the receipt you want to void. This advice number must have been generated today, and be associated with accounting data.

WARNING:

Only accounting advices generated today can be voided. Accounting advices created before today cannot be voided.

Emphasize that only two fields in the lower block of this form are accessible and that all the other fields in this block simply display data for verification purposes.

When you enter a valid accounting advice number and move to the Void Accounting Advice? field, data concerning the specified advice appears in the Office Code, Employee Initials, Cashier Number, Collection Method, Accounting Advice Status, Check Number, Money Amount, Date Received, Customer ID, Date and Time, Customer Name and Number, Customer Address and Number, and Remitter Name and Address fields. The information in these fields appears for reference purposes and correct receipt verification. You may not access these fields on this form.

NOTE:
Only the Void Accounting Advice? and Destination fields are accessible in the lower block of this form. All other fields in this block cannot be accessed and simply display accounting advice information so you can verify that you are voiding the correct receipt.

STEP 2

Demonstrate and discuss how to verify and COMMIT the voiding of a receipt.

Emphasize that a printer must be specified to void an accounting advice. Discuss how to choose an appropriate printer for the automatically generated voided receipt.

Answer the question, Void Accounting Advice? Enter a `Y` and press COMMIT to move to the Destination field and void the receipt, or enter an `N` and press COMMIT to return to the Enter Accounting Advice Number field at the top of the page. If you enter a `Y` and move to the Destination field, you must specify a printer ID before voiding the accounting advice. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field the accounting advice is voided, and a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records

Press any function key to acknowledge
message
```

When you acknowledge this message, the cursor returns to the Enter Accounting Advice Number field, and another message appears on the message line:

```
VOIDED Advice was put to printer
```

This message indicates that a voided copy of the selected accounting advice receipt has been (or soon will be) printed on the specified printer.

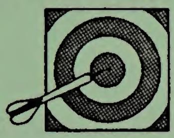
Review the Quirks subsection point by point with the class, and briefly summarize the use of the Void an Accounting Advice Form.

Quirks and special data issues for CASE144F:

- You may not void and accounting advice unless the office code and employee initials entered on this form exactly match (including blank spaces) the office code (if present) and employee initials on the receipt you want to void.
- The accounting advice number entered on this form must exist and be associated with accounting information.
- You may only void an accounting advice during the same business day that it was created. You may not void and accounting advice that was generated yesterday or earlier.
- Only the Void Accounting Advice? and Destination fields are accessible in the lower block of this form. All other fields in this block cannot be accessed and simply display accounting advice information so you can verify that you are voiding the correct receipt.
- When you answer the question Void an Accounting Advice? with a Y or N, you must press COMMIT to either move on to the Destination field or return to the Enter Accounting Advice Number field.
- When you press NEXT FIELD with a valid printer ID in the Destination field, the selected accounting advice is voided, a copy of the voided receipt is printed on the specified printer, and messages concerning the print job appear on the message line.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Accounting Advice for Random Serial Numbers Form (CASE162F)



45 minutes
(Including Exercise F-3)

Review the purpose of the Accounting Advice for Random Serial Numbers form.

Purpose and use of Accounting Advice for Random Serial Numbers Form:

This form allows you to enter accounting advice and money action information related to random case serial numbers, all accounted for on a single accounting advice receipt. In using this form, you create and print an accounting advice receipt for existing case(s) by entering action record and accounting advice record data for each random serial number you specify.

Review who uses this form and why.

BLM personnel responsible for creating and printing an accounting advice receipt for random case serial numbers, as well as entering money action record information for these serial numbers use this form to perform their tasks.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE162F program name in QXFER:

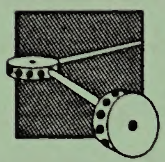
The Accounting Advice for Random Serial Numbers Form (CASE162F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice - Random Serial Numbers option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE162F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- Case Serial Number.
- Date of the accounting advice receipt (the current date is the default).
- Employee Initials (Alaska only).
- Date Received (i.e., the date receipted monies are actually received).
- Customer ID.
- Action Code.

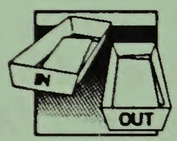
- Action Date (the date entered in the Date Received field is the default).
- Fund Symbol (required only for money action records).
- Money Amount (required only for money action records).
- A decision whether or not to print an accounting advice receipt. If you choose to print a receipt, you must specify a destination printer ID.



Review this form's basic structure and the types of data that can be entered, retrieved and printed.

Structure of the form:

The Accounting Advice for Random Serial Numbers Form consists of three pages. Page 1 contains fields that allow you to enter a case serial number, date and time of the accounting advice, office code and initials of the employee authorizing this receipt, cashier number, method and date of payment, and data concerning a customer and payment remitter. Page 2 contains fields that allow you to enter accounting advice remarks, as well as accounting advice and money action records for randomly specified case serial numbers. When you commit data entered on pages 1 and 2 to the database, fields on page 3 display the accounting advice number generated, and allow you to specify whether or not you want an accounting advice receipt printed.

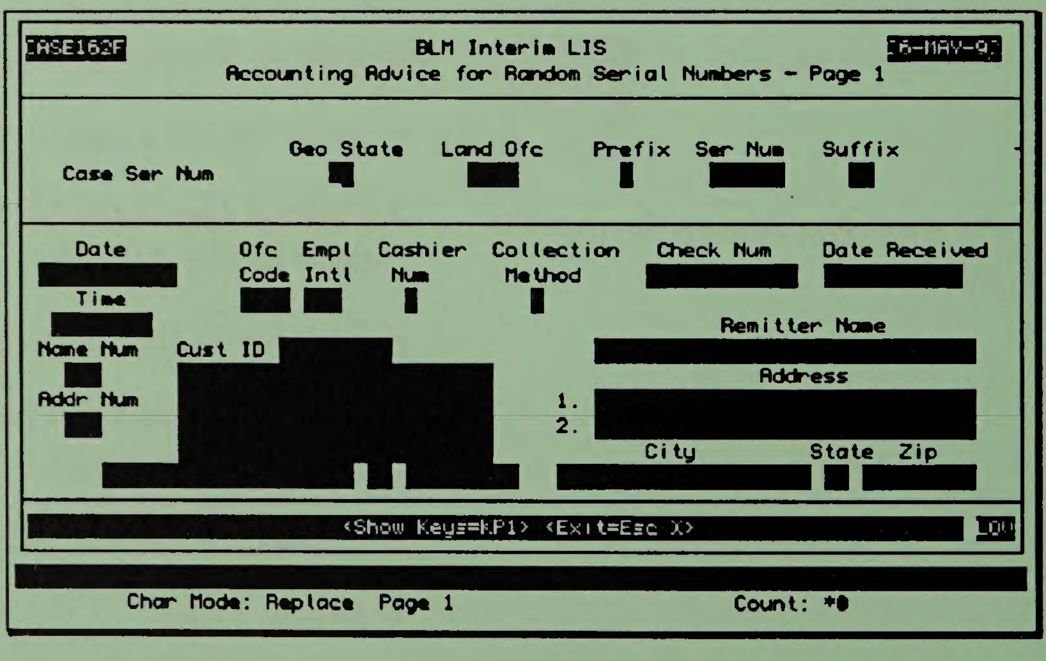


Review the step-by-step workflow for the Accounting Advice for Random Serial Numbers form.

Use the available training aids as needed.

Use a printed BLM Accounting Advice Receipt form as a reference.

Workflow within this form and a review of the form's pages and fields:



STEP 1

Demonstrate the use of LOV where available.

Explain that, although several random serial numbers can be entered on this form, one valid number is required to begin using the form.

Enter a valid case serial number in the fields at the top of page 1. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Farther on in this form, you are allowed to enter other random serial number(s) for the receipt, but to begin using the form, one valid serial number is required on this page.

Mention that data for the first customer in the specified case is automatically placed on Page 1.

The customer ID, name number (and name), and address number (and address) of the first customer in the specified case are placed automatically in the appropriate fields on page 1.

Demonstrate how to enter dates and times different from the defaults.

The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. The value in the Date field is printed at the top of the accounting advice receipt as the date the it was created. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).

Enter your office code and initials or the office code and initials of the employee authorizing this accounting advice receipt.

Mention that employee initials are required in Alaska.

NOTE:
Employee initials are required in Alaska.

Discuss each of the remaining data elements on page 1.

Enter the optional cashier number that identifies a specific person bonded and authorized to perform cashier functions in the BLM state offices for the purpose of collecting, receiving and validating monies from the general public into the U.S. Treasury. Use the List of Values (LOV), if necessary.

Enter the optional collection method code that identifies the type of payment used to receive monies from the public. Use the List of Values (LOV), if necessary. If the collection method is by check or money order, the cursor moves to the optional Check Number field so that you may enter a check number.

Emphasize that Date Received is required.

The mandatory Date Received field records the date monies are received by your office, and defaults to today's date. This date prints in the lower right corner of the receipt, next to employee initials. Either accept the default date or change it.

Demonstrate and explain how to change customer data on Page 1. Emphasize which customer ID's, names and numbers can be entered.

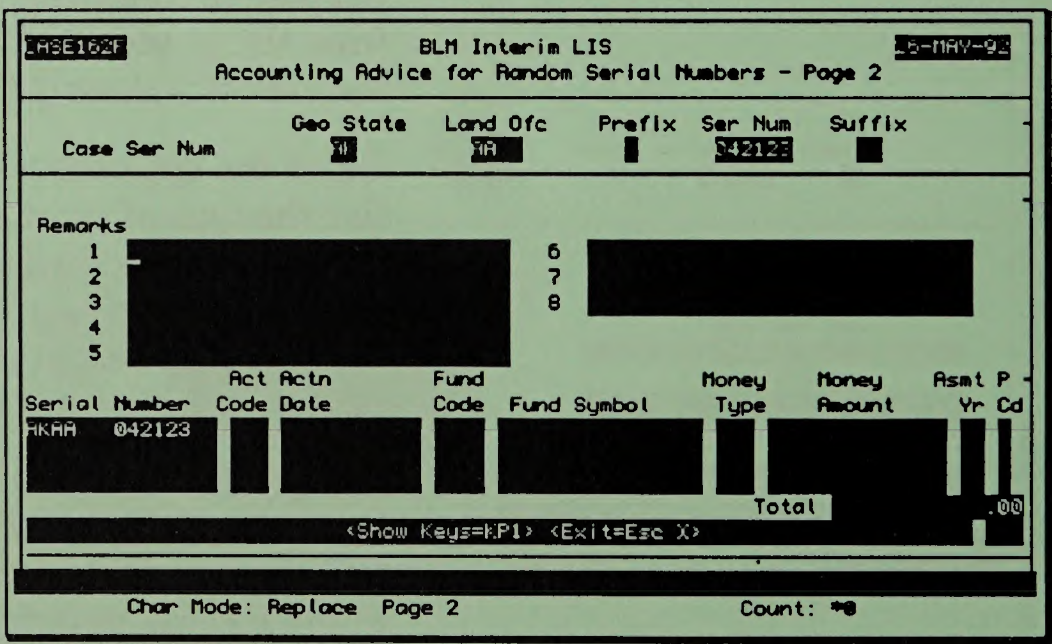
The required Customer ID field and the optional Name and Address Number fields are skipped, and the cursor moves to the Remitter Name field. Use PREVIOUS FIELD to move back to the Customer fields, as needed. You may replace or delete values in the Address and Name Number fields, and replace the Customer ID; the Name and Address fields are for display only and cannot be accessed. There are no Lists of Values (LOV) available in the Customer fields.

NOTE:

If you change the customer ID automatically placed in the Customer ID field, the new ID must be for a customer in the case whose serial number was entered at the top of the page. If you change the name and address numbers automatically placed on this form, they must exist within the selected customer ID, but do not have to be the numbers associated with the ID in the specified case.

Enter the optional remitter's name, address (use 2 lines, if necessary), city, state and zip code if they are different from the displayed customer data. Use the Lists of Values (LOV) available in the State and Zip Code fields, if necessary.

When you press NEXT FIELD in the Zip Code field, the cursor moves to page 2 of the form.



STEP 2

The Case Serial Number fields at the top of page 2 display the serial number entered on page 1 and cannot be accessed.

Explain where numbered remarks entered on Page 2 appear on a printed receipt and that each line of remarks can relate to a specific fund code/ symbol on receipts.

Below the case serial number are eight optional 30-character fields for accounting advice remarks related to the fund codes/symbols appearing on the printed receipt or referencing other pertinent information to this accounting advice.

Enter any appropriate accounting advice remarks related to the fund codes and fund symbols to be entered for this accounting advice. There is no word wrap from one line of remarks to the next; you must press NEXT FIELD at the end of each line to continue to the next line.

Demonstrate using NEXT BLOCK to skip blank lines and move directly to the Action Code field.

To skip any remaining lines of remarks and move directly to the Action Code field in the first record at the bottom of the page, press NEXT BLOCK on a blank line in the Remarks field.

NOTE:

The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the eight line(s) to use if you want a specific line of remarks to line up with a particular money line on the printed receipt. Accounting advice remarks print single spaced on the first page of the receipt.

Refer to a BLM printed receipt form. Explain that the last two lines of remarks on a receipt generated by this form are reserved for a message about the receipt continuing on additional pages where random serial numbers entered on this form are printed.

Although there is room for ten lines of remarks on a receipt, the last two lines are reserved for a message regarding receipts that continue on more than one page. Additional pages of the receipt contain the random case serial numbers entered on this form.

Mention that the collection method (and check number) as well as office code and employee initials are printed below remarks on the receipt.

The collection method (and check number if appropriate) specified on page 1 of this form is printed automatically on the first page of the receipt below the lines of remarks entered on page 2.

STEP 3

Thoroughly review and demonstrate entering random serial numbers, action data and accounting data on Page 2 and discuss the information that can be entered in each field.

Emphasize that you are adding actions to the specified cases as well as creating a single accounting advice receipt.

Mention that more than three records can be entered.

The bottom portion of page 2 allows you to enter random case serial numbers, action data and accounting advice information for this accounting advice receipt. For each case serial number entered, you may enter an action code, action date, fund code, fund symbol, money type, money amount, assessment year and parcel code. Depending on the case type and action code, some fields may be inaccessible or skipped automatically. When you print this receipt, the information in each record in this portion of page 2 is used to create both an action record in the appropriate case and accounting advice records in the System.

More than the three displayed records can be added to this accounting advice; as you add additional records in this portion of page 2, previously entered records scroll out of view. Use the appropriate function keys to scroll through these records.

Demonstrate and discuss entering case serial numbers using blank spaces when needed.

Enter the mandatory case serial number for this receipt to which you want action and accounting advice information added. The first record contains the serial number entered on page 1; you may accept this default or replace it. All complete serial numbers are verified by the System. This field has no spaces between the five elements of the case serial number, so you must enter blank spaces where appropriate (e.g., AKFF___084772__); trailing blanks do not need to be entered.

Emphasize that action codes are case type sensitive.

Enter the mandatory action code (associated with the money transaction referenced in this record) for the action record to be added to the specified case. Only certain action codes are valid for each case type. Use the List of Values (LOV), if necessary.

Emphasize that refund money action codes are not allowed and that refund actions must be entered on CASE163F.

NOTE:

Refund money action codes are not accepted on this form. Refunds should be handled on the Accounting Advice Transaction Transfers Form (CASE163F).

Mention that the required action date can be changed from the default.

The mandatory Action Date field defaults to the date entered in the Date Received field on page 1 when you press NEXT FIELD in the Action Code field. Cursor

Demonstrate and discuss how cursor movement beyond the Action Code field is determined by case type and whether the action is a money or non-money action.

movement beyond the Action Code field is determined by whether the action code entered is for a money action or a non-money action.

If the action code entered is for a non-money action, the cursor skips to the Assessment Year field. To change the action date, use PREVIOUS FIELD, return to the Action Date field, and replace the value.

Explain how accounting data may be pulled from the case type/action code table.

If the action code entered is for a money action, the Fund Code, Fund Symbol and Money Type fields may fill automatically with default values pulled from the case type/action code validation table. When a default value is placed in a field, the field is skipped automatically; use PREVIOUS FIELD to return to the field to replace the default value. After defaults are placed in the appropriate fields, the cursor stops in the first blank field encountered, moving to the right from the Action Date field.

Discuss the relationship between fund codes and symbols, emphasizing that the System forces their values to be compatible.

Enter the optional fund code, if necessary. Use the List of Values (LOV), if needed. If you enter a fund code or select one from the List of Values, the Fund Symbol field fills with a default value from the validation table corresponding to the entered fund code.

*Emphasize that fund codes/symbols taken from the case type/action code LOV can be changed. Validation is with the Fund Code/Symbol table, **not** the Case Type/Action Code table.*

Enter the mandatory fund symbol (if necessary), accept the default, or overwrite the default value. Use the List of Values (LOV), if needed. If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table, and the cursor moves to the Money Type field. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

Enter the optional money type abbreviation for the money involved in this transaction (e.g., filing fee, bid amount, etc...). This code should be related directly to the action in the record. Use the List of Values (LOV), if necessary.

Emphasize that money amount is required and that, if the value is a whole dollar number, the decimal point and cents do not need not be entered.

Enter the mandatory money amount for the money received by the BLM in the transaction reflected in this money action/accounting advice record. If the money amount is a whole number, you do not need to enter a decimal point and cents. If you press NEXT FIELD without entering a value, `0.00` is placed automatically in this field.

Emphasize that Assessment Year is only for certain actions in mining claim cases.

Enter the optional assessment year (i.e., the last two digits of the year in which assessment work was performed for the case's mining claim), if appropriate. Although this field is accessible for all case types, values should be entered only for mining claim cases.

Mention that Parcel code is accessible only for Alaska Native Allotment Cases.

For Alaska Native Allotment cases only, the cursor moves to the Parcel Code field when you press NEXT FIELD in the Assessment Year field. Enter the parcel code, if appropriate, that identifies the land in the case affected by the current money action/accounting advice record.

When you press NEXT FIELD in the Assessment Year field for all case types other than Alaska Native Allotments (or when you press NEXT FIELD in the Parcel Code field for Alaska Native Allotment cases), the following message appears in the message line:

Press commit to save, next field to continue entering records.

Emphasize that COMMIT must be pressed to save data in the System, generate an accounting advice number, move to page 3 of this form and print a receipt.

Press COMMIT to save the action and accounting advice data entered on pages 1 and 2 for this accounting advice receipt and for the specified random cases; the cursor moves to page 3 of this form.

Explain the use of DUPLICATE RECORD to save having to enter the same data repeatedly.

Press NEXT FIELD, NEXT RECORD or CREATE RECORD to move to the Serial Number field in the next record in this section of page 2. On any new record, you may use DUPLICATE RECORD if values in the new record are similar to values in the previous record.

Explain that the Total field displays a running total for all the monies entered on this form.

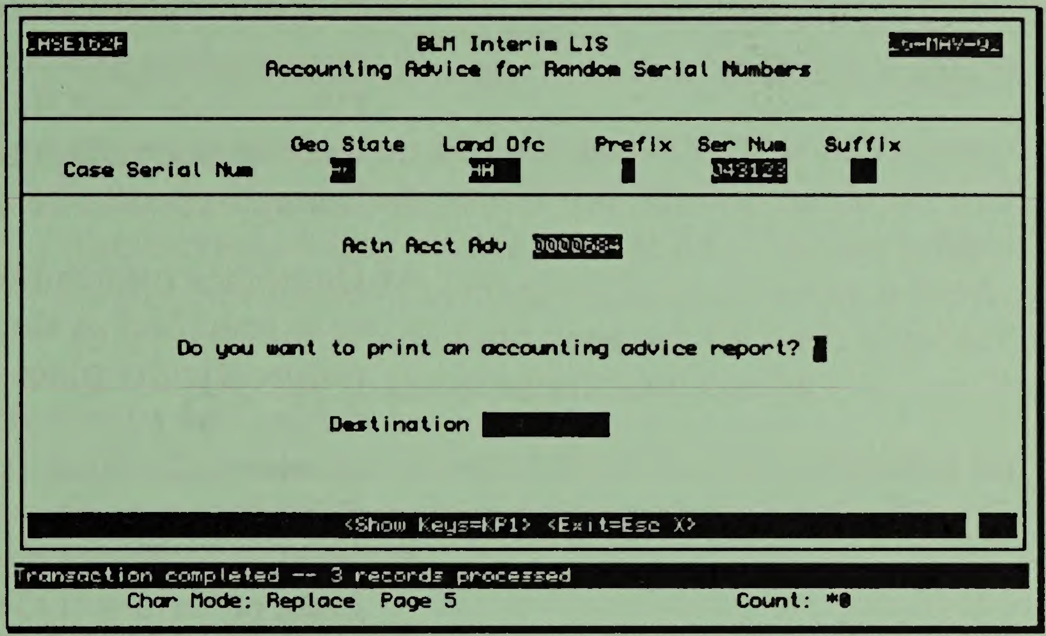
NOTE:
At the bottom right of page 2 is the Total field. This field is not accessible, and displays the running total of all the money transactions entered for this receipt for your benefit. The total money amount for the accounting advice will be printed on the receipt.

STEP 4

Describe what happens after COMMIT is pressed, including the generation of an accounting advice number.

After you COMMIT information on pages 1 and 2 to the database and move to page 3, a message indicating the number of records processed appears in the message line. Page 3 displays the case serial number

entered on page 1 and the accounting advice number associated with the action and accounting advice receipt data just committed.



Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Do You Want To Print An Accounting Advice Report? Enter a `Y` to print a receipt or an `N` to exit the form. If you enter a `Y`, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records
Press any function key to acknowledge
message
```

This message indicates that an accounting advice receipt containing the information entered on this form is being printed on the specified printer. When you acknowledge the message, you exit this form.

Quirks and special data issues for CASE162F:

- This form allows you to enter accounting advice and money action information related to random case serial numbers, all accounted for on a single accounting advice receipt.

Review the Quirks subsection point by point with the class and briefly summarize the use of the Accounting Advice For Random Serial Numbers Form.

- Although you may enter multiple random case serial numbers on this form for a single receipt, you must first enter one valid serial at the top of page 1 to begin using the form.

- The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).

- Customer information for the first customer in the case specified at the top of page 1 is retrieved and automatically placed in the form's optional Customer fields. The cursor skips the Customer fields and moves to the Remitter Name field. Use PREVIOUS FIELD to move back to the Customer fields, overwriting or deleting values, if necessary. There are no Lists of Values (LOV) available in the Customer fields.

- The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the eight line(s) to use if you want a specific line of remarks to line up with a particular money line on the printed receipt. Accounting advice remarks print single spaced on the first page of the receipt. Although there is room for ten lines of remarks on a receipt, the last two lines are reserved for a message regarding receipts that continue on more than one page. Additional pages of the receipt contain the random case serial numbers entered on this form.

- The Serial Number field at the bottom of page 2 has no spaces between the five elements of the case serial number, so you must enter blank spaces where appropriate (e.g., AKFF___084772__); trailing blanks do not need to be entered.

- Refund money action codes are not accepted on this form. Authorizing refunds should be handled on the Accounting Advice Transfer Form (CASE163F).

- Cursor movement beyond the Action Code field at the bottom of page 2 is determined by whether the action code entered is for a money action or a non-money action. If a non-money action code is entered, the cursor skips to the Assessment Year field. If a

money action code is entered, the Fund Code, Fund Symbol and Money Type fields may fill automatically with default values pulled from the case type/ action code validation table. If a default value is placed in a field, the field is skipped automatically, and the cursor stops in the first blank field encountered, moving to the right from the Action Date field.

- If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

- Although the Assessment Year field is accessible for all case types, values should be entered only for mining claim cases.

- At the bottom right of page 2 is the Total field. This field is not accessible, and displays the running total of all the money transactions entered for this receipt for your benefit.

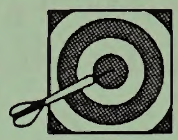
- Once you have entered as many random serial numbers and action/accounting advice records as necessary for this receipt, COMMIT this information to the database. The System saves the data entered on pages 1 and 2 of the form and moves you to page 3.

- When you press NEXT FIELD with a valid printer ID in the Destination field, an accounting advice receipt containing the data entered on this form is printed on the specified printer, and a message concerning the print job appears on the message line.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise F-3 *(Accounting Advice for Random Serial Numbers).*

Accounting Advice Transaction Transfers Form (CASE163F)



45 minutes
(Including Exercise F-4)

Review the purpose of the Accounting Advice Transaction Transfers form.

Purpose and use of the Accounting Advice Transaction Transfers Form:

This form allows you to transfer monies associated with a serial number or an accounting advice number from one money action/accounting advice record to one or more other records. To make a transfer, you must create new money records in case(s) receiving the transferred funds. Monies may be transferred between cases, if needed, and monies unrelated to cases can be transferred to one or more cases.

Review who uses this form and why.

BLM personnel responsible for transferring monies associated with a case or an accounting advice number from one action/accounting advice record to one or more others use this form to perform their tasks.

Review navigation to this form (including QXFER).

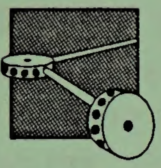
Navigation to this form and use of CASE163F program name in QXFER:

The Accounting Advice Transfer Form (CASE163F) is an option on the Accounting Advice Processing Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice Transfer option from the Accounting Advice Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE163F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

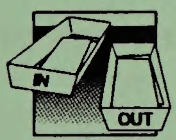
- Case Serial Number or Accounting Advice Number.
- Action Code.
- Fund Symbol.
- Money Amount.
- A decision whether or not to print a transaction transfers accounting advice report. If you choose to print a report, you must specify a destination printer ID.



Review this form's basic structure and the types of data that can be entered, retrieved, selected and created.

Structure of the form:

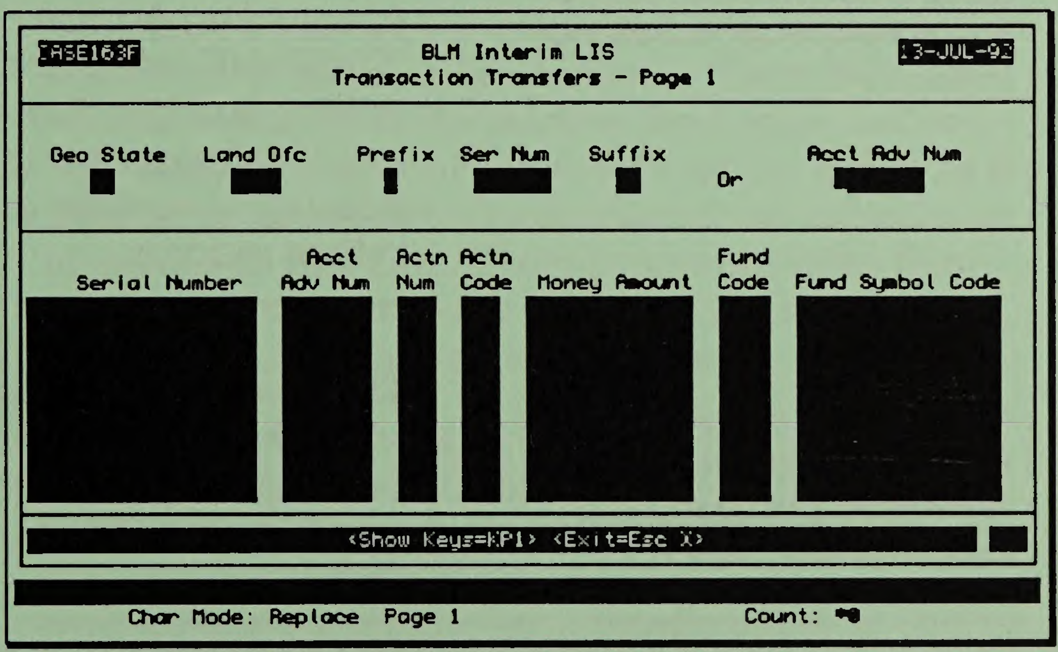
The Accounting Advice Transfer Form consists of three pages. The top block on page 1 contains fields that allow you to specify a case serial number or an accounting advice number. All action/accounting advice records containing transferrable monies within the specified case or accounting advice are displayed in the lower block on page 1, and the form allows you to select one of these records for transferring its monies. Page 2 contains fields that display the single action/accounting advice selected on page 1. Other fields on page 2 allow you to update remarks for the selected accounting advice, as well as transfer monies from the selected record to one or more new money action/accounting advice records in one or more cases. When you commit data entered on pages 1 and 2 to the database, fields on page 3 display the selected case serial number and accounting advice number, and allow you to specify whether or not you want a transaction transfer accounting advice report printed.



Workflow within this form and a review of the form's fields:

Review the step-by-step workflow for the Accounting Advice Transaction Transfers form.

Use the available training aids as needed.



STEP 1

In the block at the top of page 1, you may specify either an individual, valid case serial number or an existing accounting advice number.

Thoroughly discuss the difference between specifying a case serial number and an accounting advice number on Page 1.

If you wish to transfer monies initially associated with a single case (and possibly several accounting advice numbers), enter the appropriate, valid serial number,

Demonstrate and review what happens when a serial number is specified.

Demonstrate the use of LOV where available.

and press NEXT FIELD or NEXT BLOCK. All money action/accounting advice records containing transferrable monies in the case appear in the lower block, and the cursor moves to the first record's serial number field. Money actions associated with several accounting advice numbers may be listed for the selected case.

Demonstrate and review what happens when an accounting advice number is specified.

If you wish to transfer monies initially associated with an accounting advice number (and possibly several cases, or no cases, within the System), press NEXT FIELD in the blank Geographic State field and move to the Accounting Advice Number field. Enter the appropriate accounting advice number and press NEXT FIELD or NEXT BLOCK. All money action/accounting advice records containing transferrable monies associated with the accounting advice appear in the lower block, and the cursor moves to the first record's serial number field. Money actions in several cases may be listed for the selected accounting advice number.

Discuss how monies recorded on CASE141F appear on this form.

NOTE:

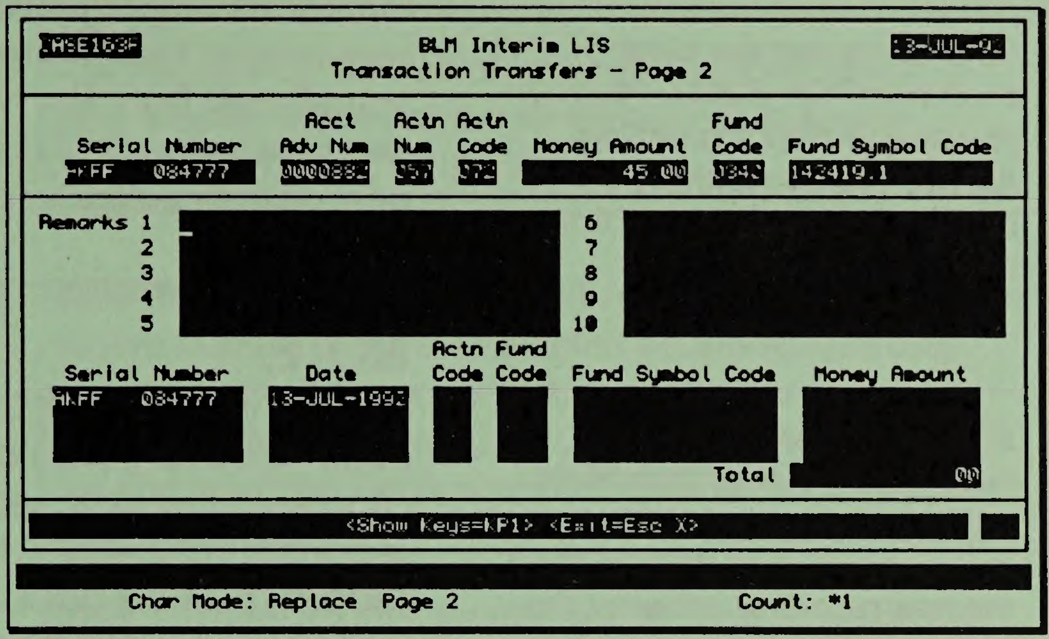
Monies received and recorded using the Accounting Advice - Not Case Related Form (CASE141F) are associated with an accounting advice number. These monies appear on this form simply as accounting advice records, and no case serial number or money action data appear in their records.

Mention that up to eight money action/accounting advice records are displayed in the lower block on Page 1.

The lower block on page 1 displays up to eight money action/accounting advice records within the specified case or accounting advice. The current record is indicated by a pointing arrow (==>) in the serial number field.

Demonstrate and discuss selecting a record on Page 1 from which you want to transfer monies.

Use NEXT/PREVIOUS RECORD to scroll through the displayed records. When you find the single money action/accounting advice record from which you want to transfer monies, press NEXT FIELD or NEXT BLOCK and move to page 2 of the form.



STEP 2

The fields at the top of page 2 display the money action/accounting advice record selected on page 1 from which you want to transfer monies. This record normally contains a case serial number and always contains an accounting advice number. Below this record are ten optional 30-character fields that display any accounting advice remarks previously associated with the current accounting advice number.

Emphasize that remarks previously entered for an accounting advice are displayed on Page 2 and can be updated from this form.

You may add, change or delete remarks, as needed, to reflect the transfer of monies taking place. Remarks should be related to the existing fund codes and symbols within the current accounting advice and/or to the fund codes and symbols to be entered for the transfer of monies on this form. There is no word wrap from one line of remarks to the next, and you must press NEXT FIELD at the end of each line.

Demonstrate how to skip remaining lines of remarks and move directly to the Action Code field.

To skip any remaining lines of remarks and move directly to the Action Code field in the first record at the bottom of the page, press NEXT BLOCK.

Mention that updated remarks can only be seen if an historical receipt is printed.

NOTE:

This form does not generate an accounting advice receipt. To see any updates made to accounting advice remarks on this form, print an historical receipt with CASE142F.

STEP 3

Emphasize that the lower portion of Page 2 is for the entry of money/action accounting advice records receiving the monies being transferred from the selected record.

The bottom portion of page 2 allows you to enter new money action/accounting advice records (within one or more cases) that are to receive the monies being transferred from the record selected on page 1. You must transfer all of the money in the selected record to new records added in this block.

Emphasize that transaction transfers cannot be committed until all the money in the selected record is accounted for in the new record(s) added at the bottom of Page 2.

NOTE:

You cannot COMMIT transaction transfer information entered on this form until all of the money in the selected action/accounting advice record is transferred. Every cent in the selected record must be accounted for in the new money action/accounting advice record(s) added in this block.

Demonstrate and discuss how to add money action/accounting advice records to the selected record's case and to different cases. Also demonstrate the transfer of money from a selected accounting advice record unrelated to case(s).

New money action/accounting advice records entered in this block must be associated with an existing case in the System. The new records can be added to the selected record's case (if one is listed), or to different cases.

Review the format of the Serial Number field.

The serial number from the selected record (i.e., the record from which monies are to be transferred) appears automatically in the first record of the lower block, and the current date appears in the inaccessible Date field. Accept this default case serial number, or use PREVIOUS FIELD, return to the Serial Number field, and enter the appropriate case serial number. All complete serial numbers are verified by the System. This field has no spaces between the five elements of the case serial number, so you must enter blank spaces where appropriate (e.g., AKFF___084772__); trailing blanks do not need to be entered.

Discuss how information entered in each record at the bottom of Page 2 is used to create both action records in cases and accounting advice records in the System.

In addition to a case serial number, you must enter a money action code, a fund code and symbol, and a money amount for each new record added in this block. When you press COMMIT, the information in each record of this block is used to create both a money action record in the specified case and accounting advice records in the System.

Emphasize that only money actions can be added on this form.

NOTE:
Only money action codes within the specified case's case type can be entered in the lower block on page 2 of this form.

Mention that more than three records can be added at the bottom of Page 2.

More than the three displayed records can be added to receive monies from the selected action/accounting advice record. As you add additional records to this block, previously entered records scroll out of view. Use the appropriate function keys to scroll through these records.

Enter the mandatory money action code (associated with the money transaction referenced in this record) for the action record to be added to the specified case. Only certain action codes are valid for each case type. Use the List of Values (LOV), if necessary.

Discuss the relationship between fund codes and symbols, emphasizing that the System forces their values to be compatible.

The Fund Code and Fund Symbol fields may fill automatically with default values pulled from the case type/action code validation table. When a default value is placed in a field, the field is skipped automatically; use PREVIOUS FIELD to return to the field to replace the default value. After defaults are placed in the appropriate fields, the cursor stops in the first blank field encountered, moving to the right from the Action Code field.

Enter the optional fund code, if necessary. Use the List of Values (LOV), if needed. If you enter a fund code or select one from the List of Values, the Fund Symbol field fills with a default value from the validation table corresponding to the entered fund code.

Emphasize that fund codes and symbols pulled from the case type/action code table can be changed; validation of fund codes and symbols is performed using the Fund Code/Symbol validation table.

Enter the mandatory fund symbol (if necessary), accept the default, or overwrite the default value. Use the List of Values (LOV), if needed. If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table, and the cursor moves to the Money Type field. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

Emphasize that money amounts are required in each new record entered in the bottom block on page 2.

Enter the mandatory money amount for the money received by the BLM in the transaction reflected in this money action/accounting advice record. If the money amount is a whole number, you do not need to enter a decimal point and cents. If you press NEXT FIELD without entering a value, `0.00` is placed automatically in this field.

When you press NEXT FIELD in the Money Amount field , the following message appears in the message line:

```
Press commit to save, next field to con-
tinue entering records.
```

Mention the use of DUPLICATE RECORD to save time and effort.

Press NEXT FIELD, NEXT RECORD or CREATE RECORD to move to the next record in this section of page 2. On any new record, you may use DUPLICATE RECORD if values in the new record are similar to values in the previous record.

Discuss the Total field at the bottom of page 2 and emphasize its running relationship with the money amount in the selected record displayed at the top of the page.

NOTE:

At the bottom right of page 2 is the Total field. This field is not accessible, and displays the running total of all the new money actions entered on this page to receive the monies from the record selected on page 1.

Discuss what happens when COMMIT is pressed.

Press COMMIT to save the money action and accounting advice data entered on pages 1 and 2 for this accounting advice transaction transfer.

Emphasize that a money action duplicating the action record selected on page 1 is added automatically to the appropriate case, except that the money amount in the duplicate record is negative.

In addition to the money actions entered on this form, a money action duplicating all of the values in the action record selected on page 1 is added automatically to the appropriate case (if one is linked to the selected money amount), except the money amount in the duplicate record is negative. This new, automatically generated negative money actions serves to cancel the originally selected actions's positive amount within the case, since the original value has been distributed among the new action(s) entered on page 2 of the form.

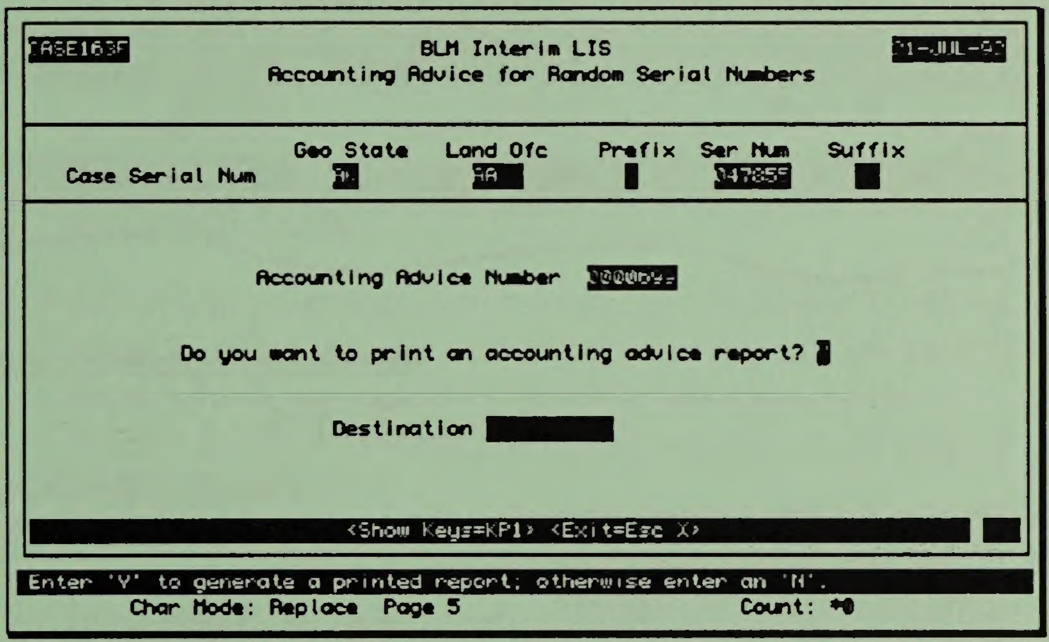
WARNING:

You cannot COMMIT transaction transfer information entered on this form until all of the money in the selected action/accounting advice record is transferred.

Emphasize and review why transaction data cannot be committed until all of the money in the selected record is transferred.

STEP 4

After you COMMIT information on pages 1 and 2 to the database and move to page 3, a message indicating the number of records processed appears in the message line. Page 3 displays the case serial number and accounting advice number associated with the money action/accounting advice record selected on page 1.



Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Do You Want To Print An Accounting Advice Report? Enter a **Y** to print a report of this transaction transfer or an **N** to exit the form. If you enter a **Y**, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 175 added to queue, 1
records
Press any function key to acknowledge
message
```

Note that the report output illustrated in CASE351F is identical to this form's.

This message indicates that an accounting advice transaction transfer report containing the information entered on this form is being printed on the specified printer. When you acknowledge the message, you return to page 1 of the form. This report is identical to the report produced by the Daily Accounting Advice Transfer Report form (CASE351F).

```
CASE163R                             BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:    AK                               TRANSACTION TRANSFERS

      ACCOUNTING ADVICE NUMBER: 0000699
      CASE SERIAL NUMBER       : AKAA   047855

                                       TRANSFERRED FROM

ACTN ACTN           ACTN ACTN                FUND FUND                   MONEY
NUM  DATE           CODE DESCRIPTION         CODE SYMBOL                 AMOUNT

SERIAL NUMBER: AAAA   047855
036 28-MAY-1992 072   FILING FEE RECEIVED 0360 14X1109                  $500.00

                                       TRANSFERRED TO

ACTN ACTN           ACTN ACTN                FUND FUND                   MONEY
NUM  DATE           CODE DESCRIPTION         CODE SYMBOL                 AMOUNT

SERIAL NUMBER: AAAA   047855
047 21-JUL-1992 088  PURCHASE PRICE RECEIV 0250 145881(22)              $500.00
```

Emphasize that records whose monies are transferred on this form, as well as the negative money actions that are created, are never displayed on page 1.

NOTE:

A money action/accounting advice record whose monies are distributed on this form, as well as the automatically generated negative money action that serves to cancel the original positive amount, are never displayed on page 1 of this form. Only the new money actions entered on page 2 containing monies capable of being transferred are displayed on page 1.

Review the Quirks subsection point by point with the class and briefly summarize the use of the Accounting Advice Transaction Transfers Form.

Quirks and special data issues for CASE163F:

- This form allows you to transfer monies associated with a serial number or an accounting advice number from one money action/accounting advice record to one or more other records. Transfers are made to new money records in case(s) receiving the transferred funds.
- This form allows you to transfer monies between cases, if needed, and monies unrelated to cases can be transferred to one or more cases.

- If you enter a single case serial number on page 1, money action/accounting advice records associated with that case (and possibly several accounting advice numbers) appear in the lower block on page 1. If you enter an accounting advice number on page 1, money action/accounting advice records (and possibly one or more case serial numbers) appear in the lower block of page 1.

- Only action/accounting advice records containing transferrable monies are displayed on page 1. Money action/accounting advice records whose monies have been distributed on this form, as well as negative money actions automatically generated to cancel the original positive amount, are never displayed on page 1 of this form.

- Monies recorded using the Accounting Advice - Not Case Related form (CASE141F) are associated with an accounting advice number. These monies appear on this form simply as accounting advice records and no case serial number or money action data appear in their records.

- Move the pointing arrow (==>) in the lower block on page 1 to the money action/accounting advice record from which you want to transfer monies, press NEXT FIELD or NEXT BLOCK and move to page 2 of the form.

- You may update accounting advice remarks associated with the current accounting advice number on page 2. Since this form does not generate an accounting advice receipt, accounting advice remark updates made on this form can be printed using the Print Historical Receipt form (CASE142F).

- You cannot COMMIT transaction transfer information entered on this form until all of the money in the selected action/accounting advice record is transferred. Every cent in the selected record must be accounted for in the new money action/accounting advice.

- New money action/accounting advice records added on page 2 must be associated with an existing case in the System and can be added to the selected record's case or to different cases.

- The Serial Number field at the bottom of page 2 has no spaces between elements of the case serial number. To enter serial numbers, place blank spaces where appropriate (AKFF____084772__); trailing blank spaces do not need to be entered.

- Only money action codes can be entered in the lower block on page 2.

- The fund code and fund symbol may fill automatically with default values pulled from the case type/ action code validation table. If a default value is placed in a field, the field is skipped automatically.

- If you select a fund code symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table. If you enter a fund symbol without entering a fund code, the Fund Code field does not fill with a value corresponding to the entered fund symbol.

- At the bottom right of page 2 is the Total field. This field is not accessible and displays the running total of all the new money actions entered on this page to receive the monies from the record selected on page 1.

- When you press COMMIT, the money action/accounting advice data entered on pages 1 and 2 are saved in the database. In addition, a money action duplicating all of the values in the action records selected on page 1 is added automatically to the appropriate case (if one is linked to the selected money amount), except the money amount in the duplicate record is negative. This new money action serves to cancel the originally selected action's positive amount within the case.

- When you press NEXT FIELD with a valid printer I.D. in the Destination field, an accounting advice transaction transfer report containing the data entered on this form is printed on the specified printer and a message concerning the print job appears on the message line. This report is identical to (and is illustrated in) the that produced by the Daily Accounting Advice Transfer Report form (CASE351F).

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise F-4** (Accounting Advice Transaction Transfers).*

Accounting Advice Reports Menu

5 minutes

Discuss navigation to the Accounting Advice Reports Menu from the Accounting Advice Processing Menu.

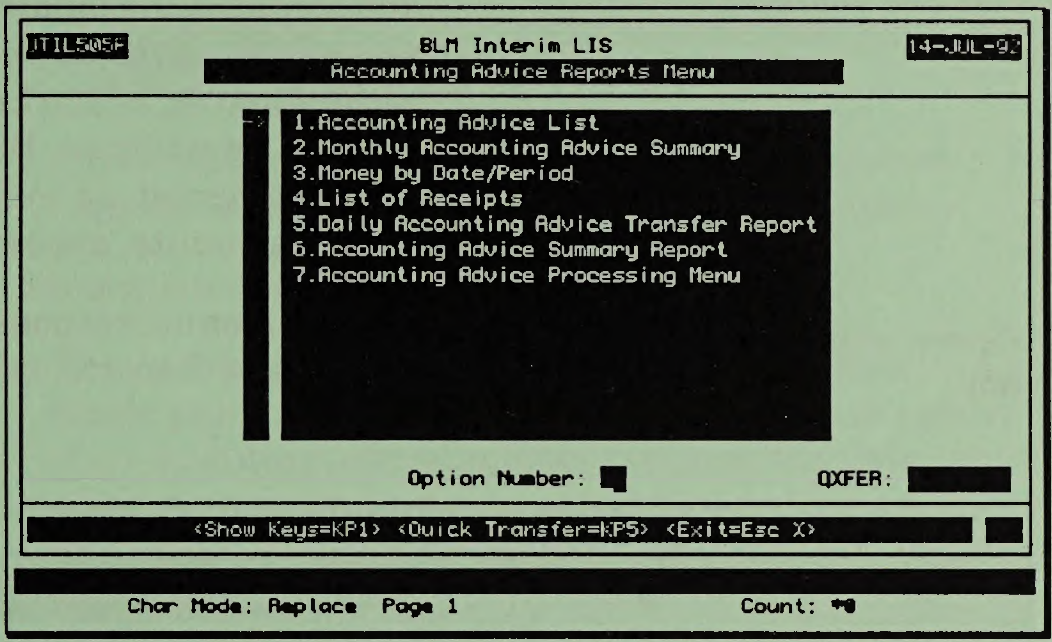
Review the general purpose of each menu option.

Refer to the Accounting Advice Processing portion of the System Map.

Demonstrate option selection procedures (including QXFER).

Prompt for and answer questions.

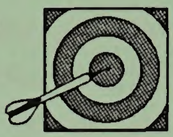
Through the Accounting Advice Reports Menu, you may access forms that allow you to generate reports concerning Interim System accounting advice information. There are five available forms on the Accounting Advice Reports Menu used to enter selection criteria for report requests:



NOTE:

The Accounting Advice Processing Menu option returns you to the menu one level higher in the System from which you can access other options in Accounting Advice Processing.

Accounting Advice List Report Form (CASE299F)



10 minutes

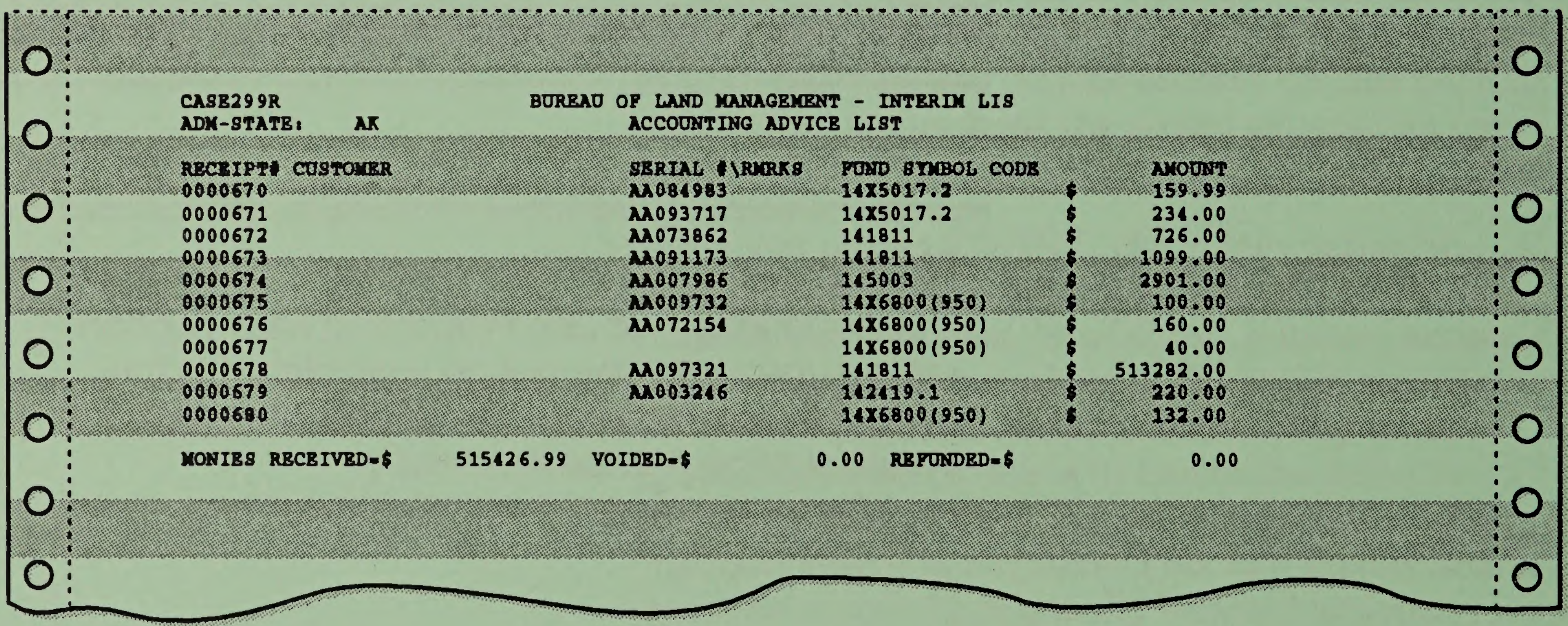
Review the purpose of the Accounting Advice List Report Form, as well as its output.

Purpose and use of the Accounting Advice List Report Form:

The Accounting Advice List Report Form (CASE299F) produces an 80-column list of accounting advice receipt information generated during a specified time period or for range of accounting advice numbers. The report sorts by ascending accounting advice number, and contains the following data for each receipt: accounting advice receipt number, customer, case serial number, remarks, fund symbol code and money amount. In addition, the total monies received for the specified period, as well as any voided and refunded money amounts, appear at the bottom of the report.

Review who uses this form and why.

BLM personnel responsible for generating Accounting Advice List Reports use this form to perform their tasks.



CASE299R — BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE: AK — ACCOUNTING ADVICE LIST

RECEIPT#	CUSTOMER	SERIAL #\RMRKS	FUND SYMBOL CODE		AMOUNT
0000670		AA084983	14X5017.2	$	159.99
0000671		AA093717	14X5017.2	$	234.00
0000672		AA073862	141811	$	726.00
0000673		AA091173	141811	$	1099.00
0000674		AA007986	145003	$	2901.00
0000675		AA009732	14X6800(950)	$	100.00
0000676		AA072154	14X6800(950)	$	160.00
0000677			14X6800(950)	$	40.00
0000678		AA097321	141811	$	513282.00
0000679		AA003246	142419.1	$	220.00
0000680			14X6800(950)	$	132.00

MONIES RECEIVED-$ 515426.99 VOIDED-$ 0.00 REFUNDED-$ 0.00

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE299F program name in QXFER:

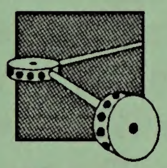
The Accounting Advice List Report Form (CASE299F) is an option on the Accounting Advice Reports Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice Reports Menu option from the Accounting Advice Processing Menu, and finally the Accounting Advice List option from the Accounting Advice Reports Menu. This form

can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the CASE299F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

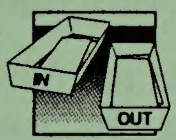
- Accounting Advice Number Range or Date Range.
- A decision to have the Accounting Advice List Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

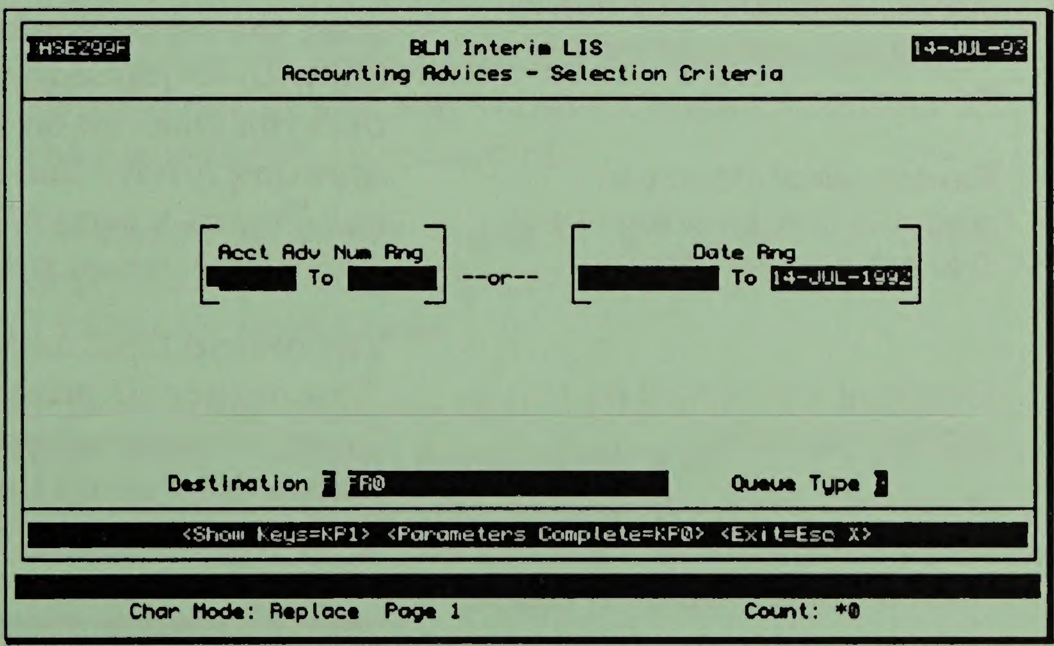
The Accounting Advice List Report Form consists of a single page containing fields that allow you to specify the accounting advice number range or the date range, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the Accounting Advice List Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:


HSE299F BLM Interim LIS 14-JUL-92
Accounting Advices - Selection Criteria

Acct Adv Num Rng
To
--or--
Date Rng
To 14-JUL-1992

Destination PR0
Queue Type

<Show Keys=KP1> <Parameters Complete=KP0> <Exit=Esc X>

Char Mode: Replace Page 1 Count: *0

STEP 1

Emphasize that this report can be requested using either a range of accounting advice numbers or a date range, but not both.

You may request this report by selecting either a range of accounting advice numbers or a date range, but not both.

Review and demonstrate how to specify a range of accounting advice numbers (including a single number) for this report.

Mention that no LOV is available.

If you want to specify a range of accounting advice numbers, enter the lower value in the first Accounting Advice Number Range field and the higher value in the second field. If you wish to specify only one accounting advice number, enter its value in both fields. No Lists of Values (LOV) are available.

Emphasize that the System does not verify accounting advice numbers entered.

NOTE:

The System does not verify the accounting advice numbers entered, and does not verify that the number entered in the first field is lower than or equal to the number entered in the second field.

Review and demonstrate how to specify a date range for this report.

If you want to specify a date range, press NEXT FIELD in the first Accounting Advice Number Range field, move to the first Date Range field, and enter the earliest date in the range. The second Date Range field defaults to the current date; accept the default or enter the latest date in the range.

STEP 2

The two destination fields allow you to specify where and how you want this form's report created.

Discuss the difference among retrieving an on-line screen display, sending off-line output to a printer, and generating a file.

Review use of the screen display option, including use of Q to exit a screen display.

Enter either a P, F or S in the first Destination field. The letter P indicates that you want an 80-column printout of the report; the letter F indicates that you want the report's information written to a computer file with no hardcopy output; and the letter S indicates that you want an on-line screen display of the Accounting Advice List Report to appear on your terminal. To exit a screen display at any time and return to CASE299F, press Q and NEXT FIELD.

Explain how to choose an appropriate printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. Enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:

A default Printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

!

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

When you press COMMIT with **E** in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the Accounting Advice List Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user52 on ZEUS) at 06:37
Job CASE299R.054329.CPL for RUREADI
(#24811) completed
```

This message indicates that the Accounting Advice List Report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Accounting Advice List Report Form.

Quirks and special data issues for CASE299F:

- The System does not verify the accounting advice numbers entered, and does not verify that the number entered in the first field is lower than or equal to the number entered in the second field. Enter your values carefully.
- The Accounting Advice List Report can be viewed as an on-line screen display at your terminal by entering S in the first Destination field and pressing COMMIT. To exit a screen display at any time and return to the form, press Q and NEXT FIELD.
- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Monthly Accounting Advice Summary Report Form (CASE300F)

15 Minutes

Review the purpose of the Monthly Accounting Advice Summary Report Form, as well as its output.

Purpose and use of the Monthly Accounting Advice Summary Report Form:

The Monthly Accounting Advice Summary Report Form (CASE300F) produces an 80-column list by office for accounting advice receipts generated for each fund symbol during the specified month. The report contains the following data: beginning and ending accounting advice numbers for the specified month, fund symbol, money amount, number of accounting advices (for each fund symbol in each office), office code, total receipts for each office, total money amount for each office, grand total (money amount and number of receipts).

Review who uses this form and why.

BLM personnel responsible for generating Monthly Accounting Advice Summary Reports use this form to perform their tasks.

```
CASE300R                        BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:    AK                  MONTHLY ACCOUNTING ADVICE SUMMARY

    BEGINNING ACCOUNTING ADVICE NUMBER: 0000651
    BEGINNING ACCOUNTING ADVICE NUMBER: 0000823
                                                                     NUMBER
                FUND SYMBOL                     MONEY AMOUNT   ACCOUNTING ADVICES

    OFFICE  234  141499                         123458628.00             26
                 141911                            223572.00              3
                 142419.1                       551087278.00             16
                 145003                             94236.00              4
                 14X1109                             3061.00             18
                 14X5017.2                      123456789.00             10
                 14X6875(11)                           50.00              1
                 14X8566                            11930.00              6

    TOTAL  OFFICE  234                          798335544.00             84

    OFFICE  LIS  14X1109                              160.50             16

    TOTAL  OFFICE  LIS                                160.50             16

    OFFICE TEST  14X1499                          3972294.00              2
           TEST  14X5017.1                          54912.00              1
           TEST  14X6800(950)                         648.00              1

    TOTAL OFFICE TEST                             4522134.00              4

    OFFICE       141499                               316.00              6
                 141811                               535.00              3
                 142419.1                               0.25              3
                 143220(16)                     423437993.82             36
                 1425003                                5.00              1
                 14X1109                            12252.76            124
                 14X6800(910)                           0.25              1
                 14X6800(950)                          28.00              2

    TOTAL OFFICE                                423437993.82            176

    GRAND_OFFICE                               1226308969.58            280
```

Review navigation to this form (including QXFER).

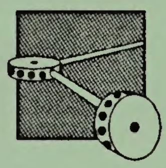
Navigation to this form and use of CASE300F program name in QXFER:

The Monthly Accounting Advice Summary Report Form (CASE300F) is an option on the Accounting Advice Reports Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice Reports Menu option from the Accounting Advice Processing Menu, and finally the Monthly Accounting Advice Summary option from the Accounting Advice Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the CASE300F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

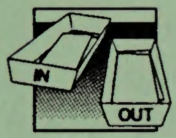
- Month abbreviation and Year.
- A decision to have the Monthly Accounting Advice Summary Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

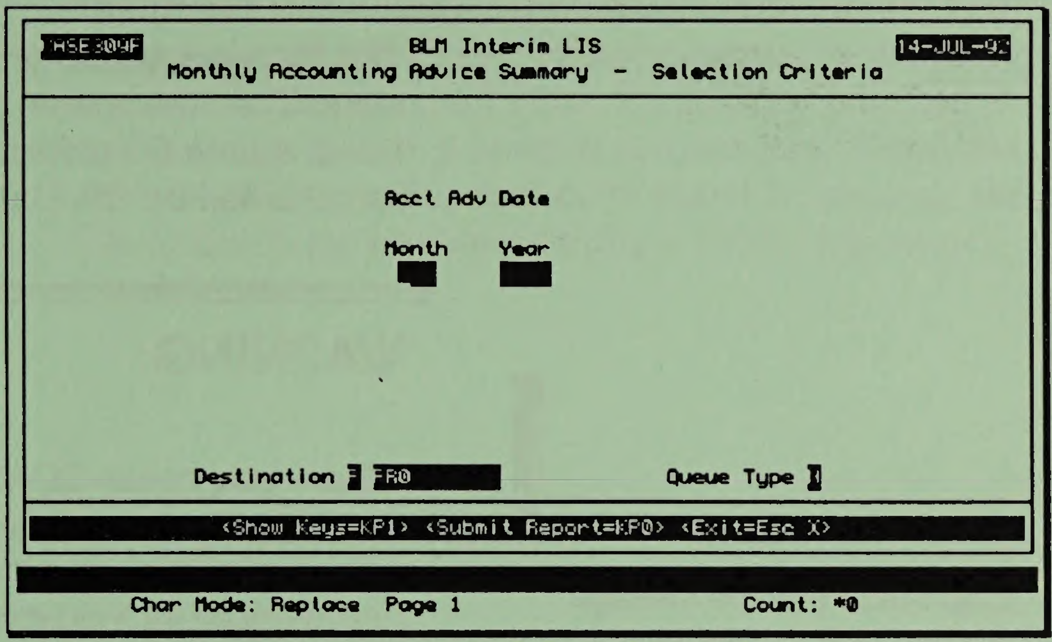
The Monthly Accounting Advice Summary Report Form consists of a single page containing fields that allow you to specify a specific month and year, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the Monthly Accounting Advice Summary Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Discuss and demonstrate entering month and year data for this report. Mention that no LOV is available.

Enter the three-letter abbreviation of the month and the four-digit year in the required Accounting Advice Date Month and Year fields. No Lists of Values (LOV) are available.

STEP 2

The two destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a **P** or an **F** in the first Destination field; the letter **P** indicates that you want an 80-column printout of the report, and the letter **F** indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose an appropriate printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. Enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the

Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

When you press COMMIT with **E** in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the Monthly Accounting Advice Summary Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user638 on ZEUS) at
12:31
Job CASE300R.162249.CPL for RUREADI
(#23023) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the Monthly Accounting Advice Summary Report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for CASE300F:

- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Monthly Accounting Advice Summary Report Form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Money by Date/Period Report Form (CASE309F)

15 Minutes

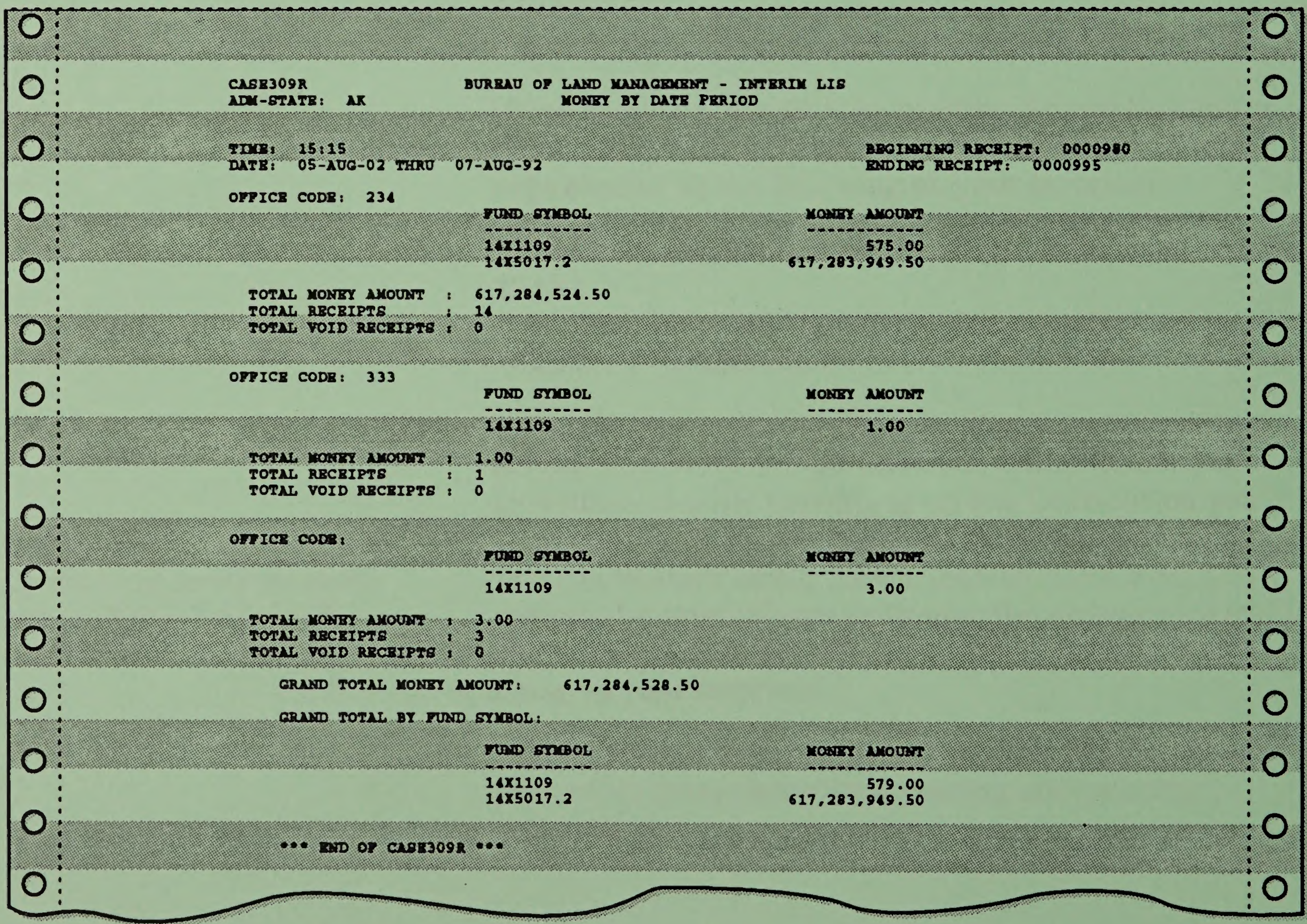
Review the purpose of the Money by Date/Period Report Form, as well as its output.

Purpose and use of the Money by Date/Period Report Form:

The Money by Date/Period Report Form (CASE309F) produces an 80-column report regarding accounting advice receipts generated during the specified date range of money amounts, by office, for each fund symbol used. The report contains the following data: time of the report, date range, beginning and ending accounting advice receipt numbers generated during the date range, office code, fund symbol, money amount, total money amount for each office, total number of receipts in each office, total number of voided receipts in each office, grand total money amount for all offices, and a grand total money amount for each fund symbol.

Review who uses this form and why.

BLM personnel responsible for generating Money by Date/Period Reports use this form to perform their tasks.



```
CASE309R                  BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:  AK                      MONEY BY DATE PERIOD

TIME:  15:15                                          BEGINNING RECEIPT:  0000980
DATE:  05-AUG-02 THRU  07-AUG-92                      ENDING RECEIPT:  0000995

OFFICE CODE:  234
                          FUND SYMBOL                        MONEY AMOUNT
                          -----------                        ------------
                          14X1109                                  575.00
                          14X5017.2                        617,283,949.50

  TOTAL MONEY AMOUNT   :  617,284,524.50
  TOTAL RECEIPTS       :  14
  TOTAL VOID RECEIPTS  :  0

OFFICE CODE:  333
                          FUND SYMBOL                        MONEY AMOUNT
                          -----------                        ------------
                          14X1109                                  1.00

  TOTAL MONEY AMOUNT   :  1.00
  TOTAL RECEIPTS       :  1
  TOTAL VOID RECEIPTS  :  0

OFFICE CODE:
                          FUND SYMBOL                        MONEY AMOUNT
                          -----------                        ------------
                          14X1109                                  3.00

  TOTAL MONEY AMOUNT   :  3.00
  TOTAL RECEIPTS       :  3
  TOTAL VOID RECEIPTS  :  0

     GRAND TOTAL MONEY AMOUNT:     617,284,528.50

     GRAND TOTAL BY FUND SYMBOL:

                          FUND SYMBOL                        MONEY AMOUNT
                          -----------                        ------------
                          14X1109                                  579.00
                          14X5017.2                        617,283,949.50

     *** END OF CASE309R ***
```

Review navigation to this form (including QXFER).

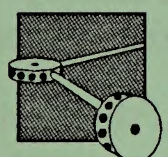
Navigation to this form and use of CASE309F program name in QXFER:

The Money by Date/Period Report Form (CASE309F) is an option on the Accounting Advice Reports Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice Reports Menu option from the Accounting Advice Processing Menu, and finally the Money by Date/Period option from the Accounting Advice Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the CASE309F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

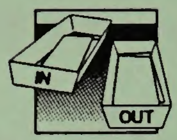
- Day, Month and Year of the beginning and ending dates for an Accounting Advice Date Range.
- A decision to have the Money by Date/Period Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

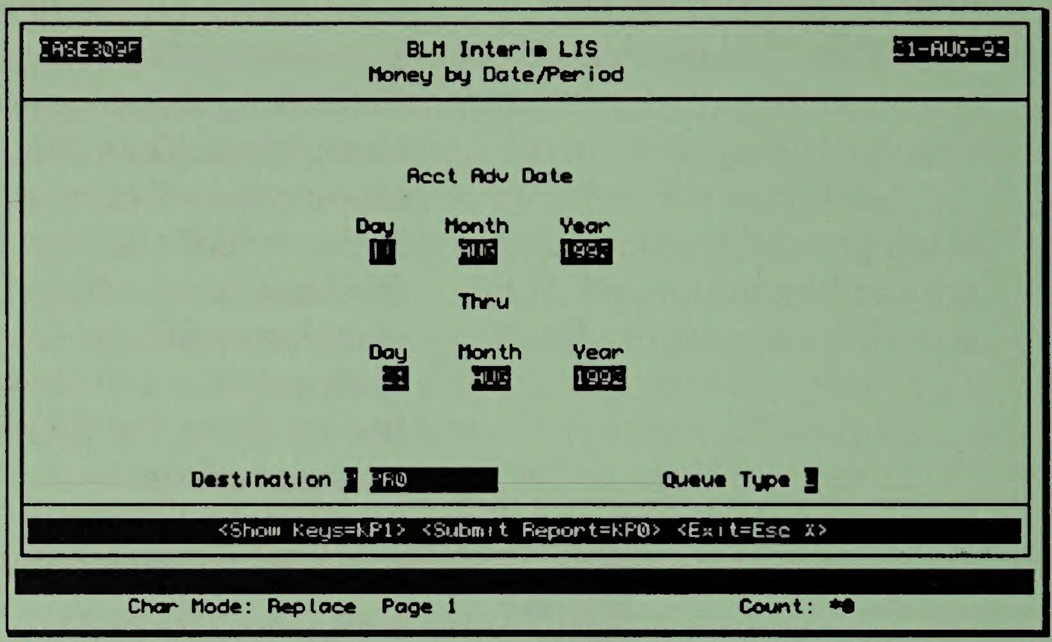
The Money by Date/Period Report Form consists of a single page containing fields that allow you to specify the day, month and year of the accounting advice date range, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Money by Date/Period Report Form.

Use the available training aids, as needed.



STEP 1

Discuss and demonstrate entering day, month and year data for the date range for this report.

The Day, Month and Year fields on the form that specify the Accounting Advice Date Range (one set for the beginning of the range, one for the end) default to today's date. Either accept the defaults, or enter the day, month and year value(s) you wish in the appropriate field(s).

STEP 2

The two destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want an 80-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose an appropriate printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. Enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

!

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the Money by Date/Period Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user11 on ZEUS) at 07:56
Job CASE309R.132459.CPL for RUREADI
(#14421) completed
```

This message indicates that the Money by Date/Period Report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Money by Date/Period Report Form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Quirks and special data issues for CASE309F:

- The accounting advice date range fields default to today's date. The range is specified using separate Day, Month and Year fields for both the beginning and end of the range.
- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Daily Accounting Advice Transfers Report Form (CASE351F)

15 Minutes

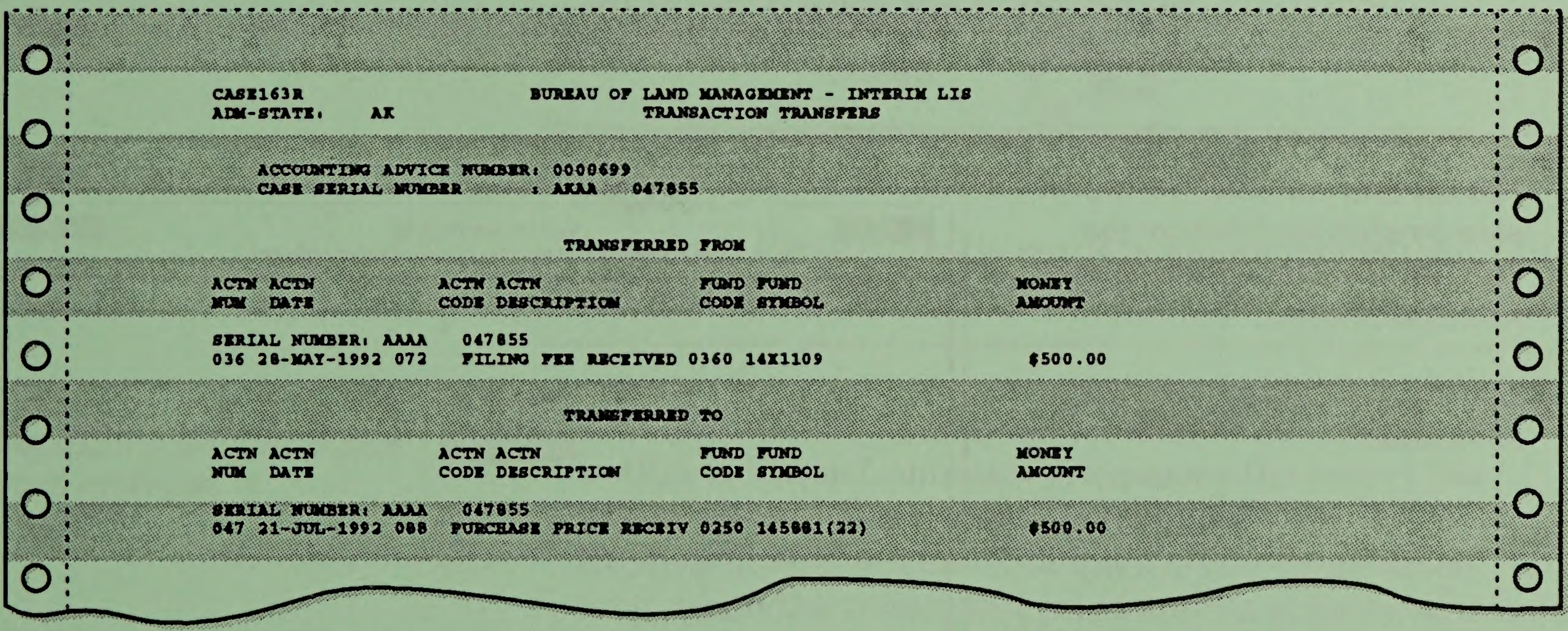
Review the purpose of the Daily Accounting Advice Transfers Report Form, as well as its output.

Purpose and use of the Daily Accounting Advice Transfer Report Form:

The Daily Accounting Advice Transfers Report Form (CASE351F) produces an 80-column report of transaction transfers performed within a single day using the Accounting Advice Transaction Transfers Form (CASE163F). This report output (CASE163R) contains the following information for each transaction: accounting advice number, case serial number, action number, action date, action code and description, fund code and symbol, and money amount for the original transaction and the new transaction (transferred from and to).

Review who uses this form and why.

BLM personnel responsible for generating Daily Accounting Advice Transfer Reports use this form to perform their tasks.



```
CASE163R                          BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:     AK                             TRANSACTION TRANSFERS

     ACCOUNTING ADVICE NUMBER: 0000699
     CASE SERIAL NUMBER       : AKAA    047855

                                  TRANSFERRED FROM

ACTN ACTN              ACTN ACTN                FUND FUND                  MONEY
NUM  DATE              CODE DESCRIPTION         CODE SYMBOL                AMOUNT

SERIAL NUMBER: AAAA    047855
036 28-MAY-1992 072    FILING FEE RECEIVED 0360 14X1109                    $500.00

                                  TRANSFERRED TO

ACTN ACTN              ACTN ACTN                FUND FUND                  MONEY
NUM  DATE              CODE DESCRIPTION         CODE SYMBOL                AMOUNT

SERIAL NUMBER: AAAA    047855
047 21-JUL-1992 088   PURCHASE PRICE RECEIV 0250 145881(22)                $500.00
```

Navigation to this form and use of CASE351F program name in QXFER:

Review navigation to this form (including QXFER).

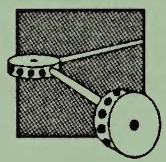
The Daily Accounting Advice Transfer Report Form (CASE351F) is an option on the Accounting Advice Reports Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice Reports Menu option from the Accounting Advice Processing Menu, and finally the Daily Accounting Advice Transfer Report option from the Accounting

Advice Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the CASE351F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

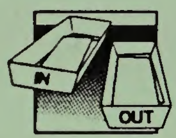
- A decision to have the Daily Accounting Advice Transfer Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

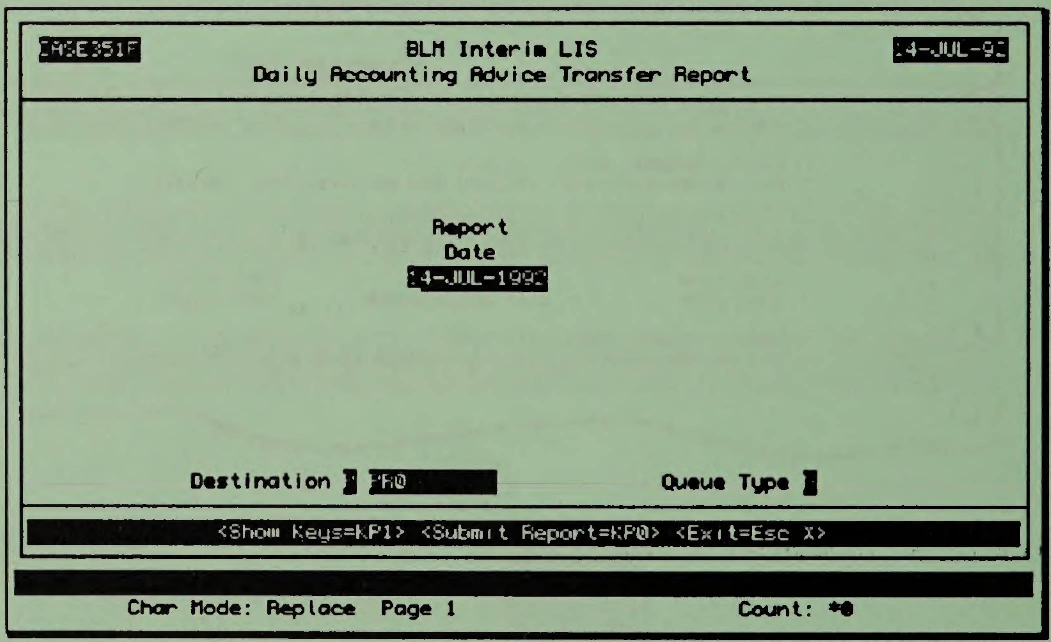
The Daily Accounting Advice Transfer Report Form consists of a single page containing fields that allow you to specify the date for this report, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the Daily Accounting Advice Transfer Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Discuss and demonstrate entering an appropriate report date for this report, as well as accepting the default date.

The Report Date field defaults to today's date. Either accept the default, or enter the appropriate date for the information to be retrieved and printed in this report.

Warn students that a date should always be specified for this report. If no date is specified, a large report of all transaction transfers recorded in the System is generated.

WARNING:

If you do not specify a date, the System generates a report of all transaction transfers recorded within the System for all dates. Please specify a date to prevent excessive demands being placed on the System and your state's paper supply.

STEP 2

The two destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want an 80-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose an appropriate printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. Enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:

A default Printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

!

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the Daily Accounting Advice Transfer Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user32 on ZEUS) at 16:37
Job CASE351R.191112.CPL for RUREADI
(#05467) completed
```

This message indicates that the Daily Accounting Advice Transfer Report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Quirks and special data issues for CASE351F:

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Daily Accounting Advice Transfer Report Form.

- The Report Date field defaults to today's date. Either accept the default, or enter the appropriate date for the information to be retrieved and printed in this report.
- If you do not specify a date, the System generates a report of all transaction transfers recorded within the System for all dates. Please specify a date to prevent excessive demands being placed on the System and your state's paper supply.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Accounting Advice Summary Report Form (CASE352F)

30 Minutes
(including Exercise F-5)

Review the purpose of the Accounting Advice Summary Report Form, as well as its output.

Purpose and use of the Accounting Advice Summary Report Form:

The Accounting Advice Summary Report Form (CASE352F) produces an 80-column list of accounting advice receipt information generated for a specified range of accounting advice numbers. This report contains the following information broken out by case serial number within each accounting advice number and each action record within the case and receipt: accounting advice receipt number, case serial number, action number, action date, action code and description, fund code and description, and money amount.

Review who uses this form and why.

BLM personnel responsible for generating Accounting Advice Summary Reports use this form to perform their tasks.

```
CASE352R                          BUREAU OF LAND MANAGEMENT - INTERIM LIS
ADM-STATE:     AK                     ACCOUNTING ADVICE SUMMARY REPORT

ACCOUNTING ADVICE NUMBER: 0000700
CASE SERIAL NUMBER       : AKAA    042123

ACTN ACTN        ACTN ACTN                  FUND FUND                    MONEY
NUM  DATE        CODE DESCRIPTION           CODE SYMBOL                  AMOUNT

014 28-MAY-1992 083          MONIES RECEIVED 0005 145003                    34.00

ACCOUNTING ADVICE NUMBER: 0000700
CASE SERIAL NUMBER       : AKAA    042124

ACTN ACTN        ACTN ACTN                  FUND FUND                    MONEY
NUM  DATE        CODE DESCRIPTION           CODE SYMBOL                  AMOUNT

014 28-MAY-1992 083          MONIES RECEIVED 0005 145003                    34.00

ACCOUNTING ADVICE NUMBER: 0000700
CASE SERIAL NUMBER       : AKAA    042132

ACTN ACTN        ACTN ACTN                  FUND FUND                    MONEY
NUM  DATE        CODE DESCRIPTION           CODE SYMBOL                  AMOUNT

014 28-MAY-1992 083          MONIES RECEIVED 0005 145003                    34.00
```

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE352F program name in QXFER:

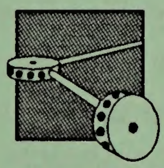
The Accounting Advice Summary Report Form (CASE352F) is an option on the Accounting Advice Reports Menu. It is accessed by choosing the Accounting Advice Processing Menu option from the Interim System Main Menu, then the Accounting Advice

Reports Menu option from the Accounting Advice Processing Menu, and finally the Accounting Advice Summary Report option from the Accounting Advice Reports Menu. This form can also be accessed from any menu in the Interim system (even a menu or submenu in a different chapter) by using the QXFER field and the CASE352F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

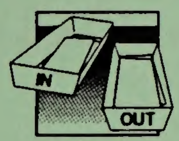
- Lower and Upper Accounting Advice Numbers.
- A decision to have the Accounting Advice Summary Report either written to a file or printed on a printer. If you choose to have the report printed, you must also have the printer's ID.
- A decision to place the report job in the Express queue or the Nite queue on the Prime Computer.



Review this form's structure and the types of data that can be entered.

Structure of the form:

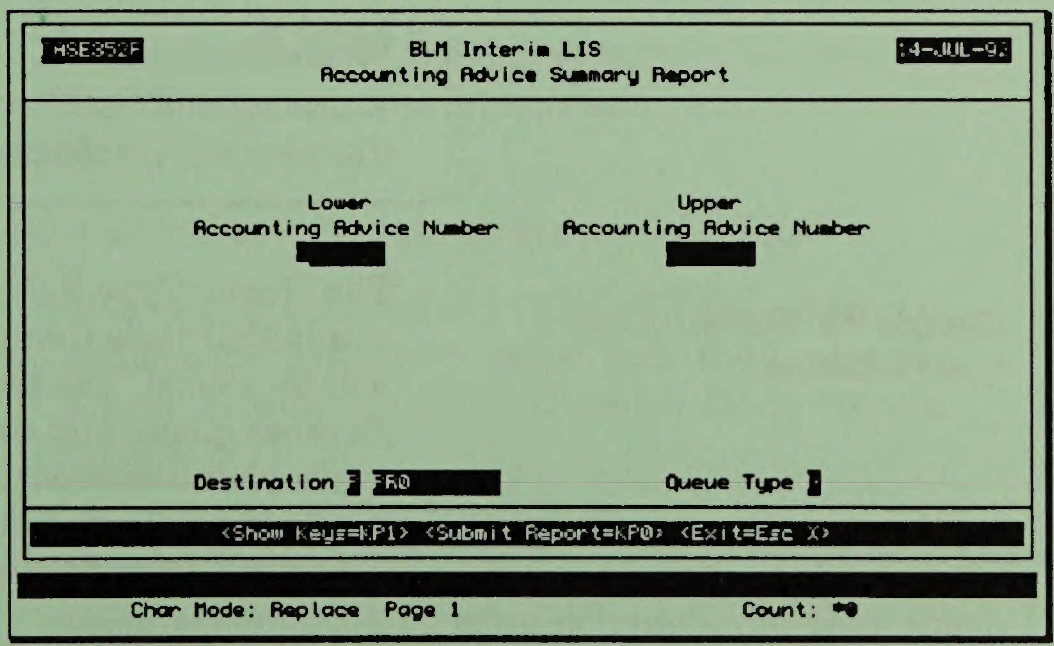
The Accounting Advice Summary Report Form consists of a single page containing fields that allow you to specify an accounting advice number range, whether you want a file or printed report generated, and which queue on the Prime Computer you want the report job placed in.



Review and demonstrate the step-by-step workflow for the Accounting Advice Summary Report Form.

Use the available training aids, as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Discuss and demonstrate entering the required lower and upper accounting advice receipt numbers for this report. Mention that no LOV is available.

Enter the lower and upper accounting advice receipt numbers for this report. No Lists of Values (LOV) are available. You cannot successfully COMMIT the selection criteria for this report unless both the Lower and Upper Accounting Advice Number fields contain values.

NOTE:
The System does not verify the accounting advice numbers entered, and does not verify that the lower accounting advice number is truly lower than the upper number.

STEP 2

The two destination fields allow you to specify where and how you want this form's report created.

Discuss the difference between sending off-line output to a printer and to a file.

Enter either a P or an F in the first Destination field; the letter P indicates that you want n 80-column printout of the report, and the letter F indicates that you want the report's information written to a computer file with no hardcopy output.

Explain how to choose an appropriate printer.

The second Destination field contains the Printer ID for a particular printer in your office and/or state. Enter the appropriate Printer ID in the second Destination field, using the available List of Values (LOV), if necessary.

NOTE:
A default Printer ID may appear automatically in the second Destination field.

Discuss the different queue types available.

The Queue Type field indicates into which of the two available Prime Computer job queues the report job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the report will print and its priority within the System. Your state's Database Administrator has the option of restricting this report to the Nite queue.

The Express queue prints the report as soon as possible. The Nite queue places the report request in a batch queue for printing the report after office hours, as specified by the Database Administrator.

WARNING:

When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Emphasize that the average System user cannot stop a report once it is sent to a queue, especially the Express queue.

If you send the Accounting Advice Summary Report to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user32 on ZEUS) at 08:37
Job CASE352R.222441.CPL for RUREADI
(#04231) completed
```

This message indicates that the Accounting Advice Summary Report has been either printed out or written to a file depending on the Destination you have chosen. If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

Discuss and demonstrate the use of REDISPLAY PAGE.

If you chose to have the report written to a file, check your office procedures for accessing and printing report files.

Review the Quirks subsection point by point with the class, and briefly summarize the use of the Accounting Advice Summary Report Form.

Quirks and special data issues for CASE352F:

- You cannot successfully COMMIT the selection criteria for this report unless both the Lower and Upper Accounting Advice Number fields contain values.
- The System does not verify the accounting advice numbers entered, and does not verify that the lower accounting advice number is truly lower than the upper number

- When you press COMMIT with E in the Queue Type field, the System queries the database and generates the report immediately through a batch queue. You cannot cancel the report without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, you must contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise F-5 (Accounting Advice Report Forms).

30 Minutes
(Course Review and Summary, Questions, Close-Out and Evaluations)

Briefly review and summarize the material covered in the Accounting Advice Processing Course.
Prompt for and answer questions.

Close-Out with the class, and have each participant fill out an Instructor Evaluation Form.

G

G. Restricted Case Processing Training Guide

The purpose of this course is...

• To teach students to perform restricted procedures related to land and mineral case processing functions using the Interim System forms. These functions include:

- assigning single and multiple serial numbers

- adding a block of previously serialized cases

- establishing a block of new cases and generating an accounting advice

Instructor's Version

Includes Teaching Notes

- adding action records to a range of serial numbers

- adding general remarks to a range of serial numbers and to random serial numbers

- voiding cases

-adding claim names to random serial numbers

- generating a mining claims tape

1. The Interim System Restricted Case Processing Course

1.1 Participants

10 minutes
(Instructor Introductions, purpose on p. 1, Participants, Prerequisites and Questions.)

The Interim System Restricted Case Processing course teaches BLM employees how to access and use the portion of the Interim System specifically designed for higher-level database functions associated with automated land and mineral case recordation data. Access to this portion of the Interim System is restricted to a select number of BLM employees responsible for high-level, security-sensitive database tasks. Due to their widespread privileges within the Interim System database, users of restricted case processing take on a large responsibility for maintaining the integrity of the System. This course is required for BLM employees responsible for either restricted case processing or the support of such tasks.

Individuals participating in this course should fit clearly into at least one of the following personnel categories:

Emphasize who should and should not be in this class.

Ad-Hoc Data Query Personnel
This category of users develops ad hoc queries to extract and compile information from the Interim System database. These users extract data to construct queries for non-routine reports.

Restricted Case Processing Personnel
This category consists of individuals who assign case serial numbers, establish blocks of cases and generate associated accounting advices, add actions or general remarks to ranges of serial numbers, add general remarks to random serial numbers, void cases, add claim names to random cases and generate mining claim tapes.

System Application Support & Maintenance Personnel
Individuals in this category maintain the operational status of the Prime computers and the Interim System software. These individuals assure data integrity and handle system quality assurance/quality control (QA/QC) issues.

1.2 Course Prerequisites

Emphasize that this course will make little sense to those who have not taken the prerequisite course.

- Exposure to and understanding of the information presented in the *Interim System Data Retrieval (BLM)* course.
- Exposure to and understanding of the information presented in the *Interim System Case Processing* course.

Although the Interim System Restricted Case Processing course contains a brief review and question and answer session concerning the concepts, terms and access procedures (Prime and Interim System) taught in the prerequisite courses, students should already be familiar with this material. Students should also be familiar with the purposes and use of Interim System forms in Case Processing, Report Processing and Data Retrieval Functions. Interim System Restricted Case Processing trainers will assume that participants need only a quick warm-up before launching into new information. Students should review all the training materials they received in prerequisite courses before coming to class.

All Interim System Restricted Case Processing course participants should be familiar with the following topics:

- Why the BLM is implementing the Interim System at this time.
- What a Relational Database Management System (RDBMS) is in the context of the Interim System.
- What types of information are available in the Interim System.
- What types of data manipulations the Interim System can perform.
- Interim System database and Structured Query Language (SQL) concepts and terminology.
- How to access and navigate on the Prime.
- How to access the Interim System and use Interim System/Oracle® login procedures.
- Interim System security.
- Interim System structure, system map, and basic navigation in the menu-driven Interim System.

- Functional use of Interim System Report Processing and Data Retrieval Functions.
- Proper use of the forms in Report Processing and Data Retrieval Functions for the performance of all on-line and off-line data retrieval tasks in the Interim System database.
- Functional use of Interim System Case Processing.
- Proper use of the forms in Case Processing for the performance of all basic case processing tasks in the Interim System database.

Prompt for and answer questions.

15 minutes
(Ice Breaker, Housekeeping, Rules and Attendance)

For and ice breaker have students fill out name tags/place cards and introduce themselves.

Review the Housekeeping Rules for the classroom.

Pass the Attendance Sign-In sheet around the class.

2. Purpose of Restricted Case Processing Course

10 minutes
(Restate the Purpose of this Course, What is Restricted Case Processing?, AALRS Tasks Covered in this Course, Course Objectives and Course Schedule.)

Restate the Purpose of the Restricted Case Processing Course.

To teach students to perform restricted procedures related to land and mineral case processing functions using the Interim System forms. These procedures include: assigning single and multiple serial numbers, adding a block of previously serialized cases, establishing a block of new cases and generating an accounting advice, adding action records to a range of serial numbers, adding general remarks to a range of serial numbers and to random serial numbers, voiding cases, adding claim names to random serial numbers and generating a mining claims tape.

Access to these functions is controlled strictly by system security and the Database Administrator (DBA), and only selected users of the Interim System have privileges to use them. These functions are restricted because they can affect critical fields and data values stored in the database and/or alter large numbers of values stored in (or output from) the Interim System with a minimum of effort; i.e., it is simple to misuse these functions and adversely affect large portions of the database.

2.1 What is Restricted Case Processing?

Explain what restricted case processing is in general and briefly review the tasks that can be performed using the forms in the Restricted Case Processing portion of the System.

Refer to the System Map when reviewing restricted case processing tasks and forms.

This course uses the term restricted case processing to address the set of automated tasks that affect crucial data values or large numbers of values stored in the Interim System database. Specifically, restricted case processing includes the following tasks:

- **Assigning** (i.e., reserving) one or more serial numbers within the Interim System database without associating any case recordation data with the serial number(s).
- **Adding** (i.e., associating) case data to a group of previously assigned serial numbers in the Interim System database. These cases typically share similar information (e.g., case type, customer and action data, etc...).
- **Establishing** a block of identical cases and, if necessary, generating an accounting advice receipt.

- **Adding** one or more action records simultaneously to a range of cases.
- **Adding** general remarks simultaneously to a range of cases or to a set of random cases.
- **Adding** claim names to random cases.
- **Voiding** a case (i.e., changing the case status to void and deleting all information associated with the case except its serial number and status field value) in the Interim System database.
- **Generating** a mining claims tape from the Interim System database.

2.2 AALRS Tasks Covered in This Interim System Course

Briefly review the AALRS tasks addressed in this course.

Emphasize that the Interim System allows users to perform all of the (restricted) case processing tasks formerly performed in AALRS.

- Void a case serial number in the Interim System.
- Retrieve help reference for a specified data field.
- Retrieve listings of all entries and descriptions possible within a coded data element.

3. Restricted Case Processing Course Objectives

Write Objectives on a flip chart as each is reviewed.

The performance objectives outlined below should be met upon completion of the Interim System Restricted Case Processing course.

Given access to the Interim System training database and a presentation on the structure and function of specific forms, students will perform in-class exercises that simulate actual work situations. Specifically, students will:

- navigate within the menu-driven Interim System, moving among the Interim System Main Menu, the Restricted Case Processing Menu, and the submenus and forms used for restricted case processing tasks.
- access and use the Assign a Single Serial Number Form (CASE136F) and the Assign Single or Multiple Serial Numbers Form (CASE135F) to assign (i.e., reserve) case serial numbers in the Interim System database.
- access and use the Add a Block of Serial Numbers Form (CASE148F) to add a group of serialized cases sharing similar information to the Interim System database. Participants will also be able to access and use the Establish Block of New Cases and Generate Accounting Advice Forms (CASE155F and CASE156F) to establish a block of identical cases in the Interim System database and, if necessary, generate an accounting advice receipt.
- access and use the Add Action Records to a Range of Serial Numbers Form (CASE153F) to add actions to a range of case serial numbers in the Interim System database.
- access and use the Add General Remarks to a Range of Serial Numbers Form (CASE154F) and the Add General Remarks to Random Serial Numbers Form (CASE161F) to add general remarks information to ranges of case serial numbers and random case serial numbers in the Interim System database.
- access and use the Void Case Form (CASE130F) to void a serialized case in the Interim System database.

- access and use the Add Claim Names to Random Serial Numbers Form (CASE159F) to add claim names to random case serial number in the Interim System database.
- access and use the Generate Mining Claims Tape Form (CASE700X) to request that Interim System mining claims information be copied to a computer tape either for storage or transport to another computer system.

Review the class schedule.

Prompt for and answer questions.

4. Menu-by-menu, Form-by-form

10 minutes

Introduce the Menu-by-menu, Form-by-form modules, its purposes and its organization into sections and subsections.

Prompt for and answer questions concerning each type of section (Purpose, Navigation, Workflow, etc...) before moving on to discuss the next type of section.

Purpose of this module of the course:

The purpose of this training module of the Interim System Restricted Case Processing course is to present the purpose and intended use of each form and submenu in Restricted Case Processing. This module also provides an overview of the types of land and mineral recordation data addressed on each Restricted Case Processing form.

NOTE:

While the utility of each submenu and form is reviewed (along with a brief look at each form's fields), this module is not meant to present an in-depth look at each and every field.

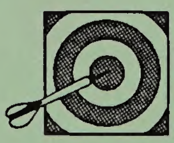
Please see the Interim System documentation for a more thorough discussion of each field and the land and mineral information for which each is designed.

Use the appropriate training aids as needed for each menu and form section: Instructor/ Student computers, keyboard templates, LCD panel and overhead projector, training database, training wall displays, System Map, flipcharts, whiteboards, markers, Training Guide, System documentation and the Data Element Dictionary.

Organization of this course module:

This module of the Restricted Case Processing Training Guide is divided into numerous sections, one for each submenu and form in Restricted Case Processing. Each section that provides information on a form is divided into subsections standard throughout this module of the training guide. Within a form's section you will always find the following subsections: **Purpose**, **Navigation**, **Required Data**, **Structure**, **Workflow**, and **Quirks**.

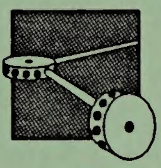
The beginning of each subsection is marked by a unique icon that appears in the left margin of the page. Examples of these icons appear to the left of the following paragraphs which describe the contents of each subsection.



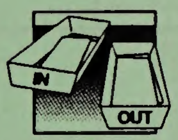
The **Purpose** subsection briefly explains the fundamental reason for using the form. It also notes who should use the form and which task or group of tasks can be performed with it.

The **Navigation** subsection explains how to access the form within the System, either by way of menu options or use of the QXFER function and the form's program name.

The **Required Data** subsection lists the minimum, specific data you must have to complete the form. Without this minimum required data, the System will not allow you to use the form to add, change, delete, or query information in the database.



The **Structure** subsection briefly describes the physical outline of the form (e.g., is the form composed of a single page or multiple pages?). If the form as a whole addresses more than one category of data, the Structure subsection lists them. This subsection may also discuss whether a form (or page in a form) is divided into several blocks of fields, and whether these separate blocks address different categories of data. This subsection many also mention whether a certain page of a multipage form is optional.



The **Workflow** subsection provides you with the step-by-step procedure for using the form. This subsection also provides you with pictures of the form or its various pages. Pay special attention to any notes or warnings you find in workflow steps.

NOTE:

In several forms in this module, there are two or three separate Workflow sections. This is because these forms can be used to perform two or three very different tasks. These different workflows have been separated to avoid the confusion of combining the steps of these different tasks.

The **Quirks** subsection lists unusual or unique features of the form that you should watch out for. It is a good subsection to review when you are new to the form, even if you feel confident that you know how to use the form.

Restricted Case Processing Menu

5 minutes

Discuss navigation to the Restricted Case Processing menu from the Main menu.

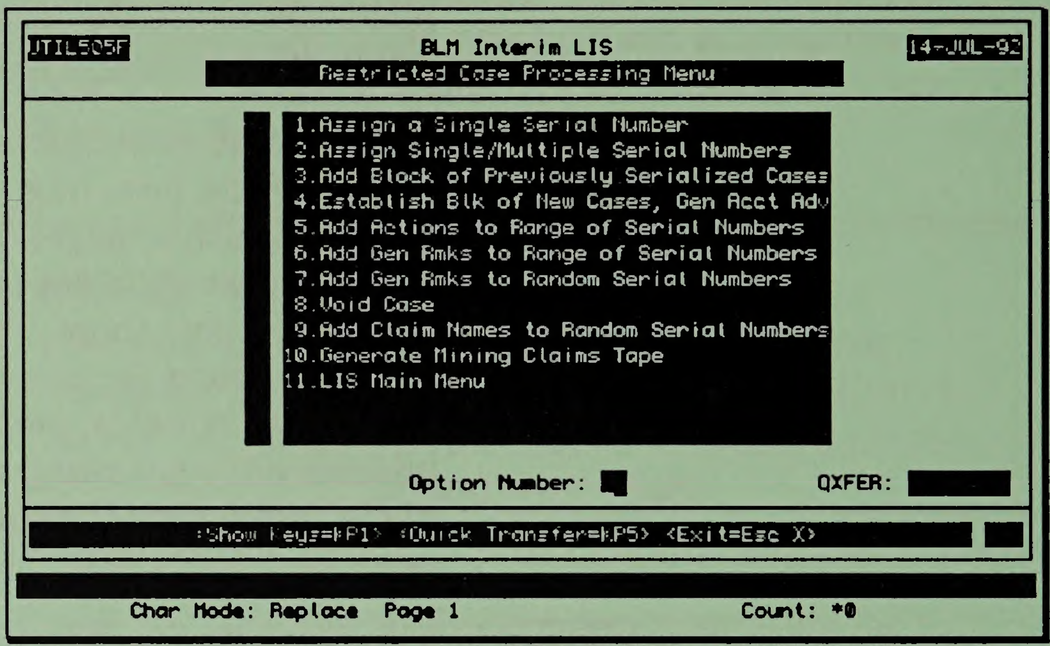
Review the general purpose of each menu option.

Refer to the Restricted Case Processing portion of the System Map.

Demonstrate option selection criteria (including QXFER).

Prompt for and answer questions.

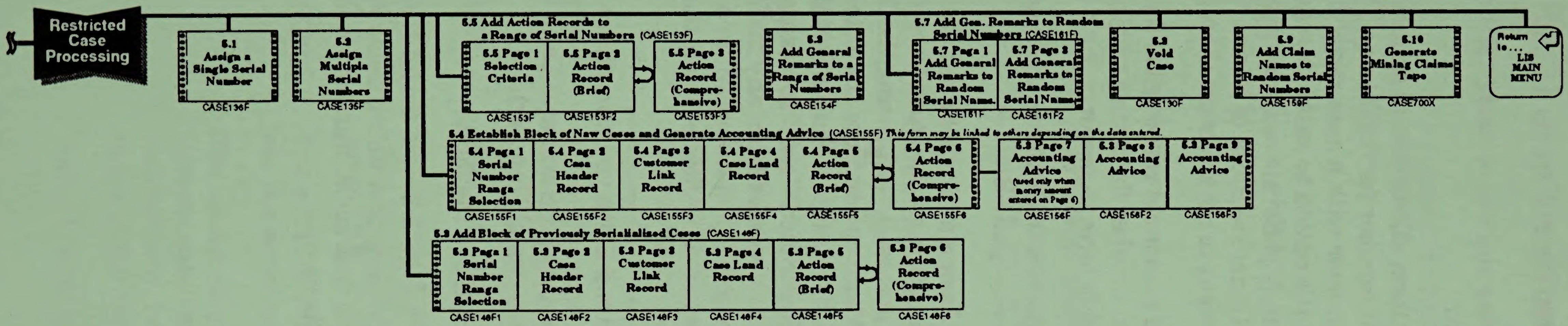
Restricted Case Processing includes several tasks requiring data and System privileges restricted to a limited number of users. There are ten options on the Restricted Case Processing Menu:



The Restricted Case Processing Menu itself identifies the options available. Each menu option has its own function and purpose within the Restricted Case Processing environment and the overall System. This Interim System training class presents an overview of each menu option and/or the form(s) accessible within them.

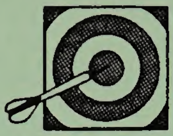
Emphasize who should and should not be in this class.

NOTE:
The Interim System Main Menu option returns you to the menu one level higher in the System, from which you can access other options in the Interim System.



Restricted Case Processing
5.1 Assign a Single Serial Number
CASE136F
5.2 Assign Multiple Serial Numbers
CASE135F
5.5 Add Action Records to a Range of Serial Numbers (CASE153F)
5.5 Page 1 Selection Criteria
CASE153F
5.5 Page 2 Action Record (Brief)
CASE153F2
5.5 Page 3 Action Record (Comprehensive)
CASE153F3
5.6 Add General Remarks to a Range of Serial Numbers
CASE154F
5.7 Add Gen. Remarks to Random Serial Numbers (CASE161F)
5.7 Page 1 Add General Remarks to Random Serial Nums.
CASE161F
5.7 Page 2 Add General Remarks to Random Serial Nums.
CASE161F2
5.8 Void Case
CASE130F
5.9 Add Claim Names to Random Serial Numbers
CASE159F
5.10 Generate Mining Claims Tape
CASE700X
Return to... LIS MAIN MENU
5.4 Establish Block of New Cases and Generate Accounting Advice (CASE155F) This form may be linked to others depending on the data entered.
5.4 Page 1 Serial Number Range Selection
CASE155F1
5.4 Page 2 Case Header Record
CASE155F2
5.4 Page 3 Customer Link Record
CASE155F3
5.4 Page 4 Case Land Record
CASE155F4
5.4 Page 5 Action Record (Brief)
CASE155F5
5.4 Page 6 Action Record (Comprehensive)
CASE155F6
5.3 Page 7 Accounting Advice (used only when money amount entered on Page 6)
CASE156F
5.3 Page 8 Accounting Advice
CASE156F2
5.3 Page 9 Accounting Advice
CASE156F3
5.3 Add Block of Previously Serialialized Cases (CASE148F)
5.3 Page 1 Serial Number Range Selection
CASE148F1
5.3 Page 2 Case Header Record
CASE148F2
5.3 Page 3 Customer Link Record
CASE148F3
5.3 Page 4 Case Land Record
CASE148F4
5.3 Page 5 Action Record (Brief)
CASE148F5
5.3 Page 6 Action Record (Comprehensive)
CASE148F6

Assign a Single Serial Number Form (CASE136F)



5 minutes

Review the purpose of the Assign a Single Serial Number form.

Review who uses this form and why.

Purpose and use of Assign a Single Serial Number Form:

This form allows you to generate and reserve a single serial number for future use. Use this form to provide a customer with a case serial number immediately with the option to enter the case data at a later time. You may generate only one serial number at a time. Use Generate Block of Serial Numbers (CASE135F) if you want to obtain more than one serial number.

BLM personnel responsible for assigning a single case serial number for future use in the Interim System use this form to perform their tasks.

Review the navigation to this form (including QXFER).

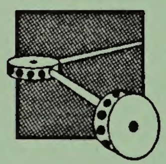
Navigation to this form and use of CASE136F program name in QXFER:

The Assign a Single Serial Number Form (CASE136F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu, then the Assign a Single Serial Number option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE136F program name.

Discuss the data required to use this form.

Required Data you must have to use this form:

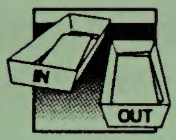
- Geographic State and Land Office (elements of a Case Serial Number).



Review this form's structure and the types of data entered and generated.

Structure of the form:

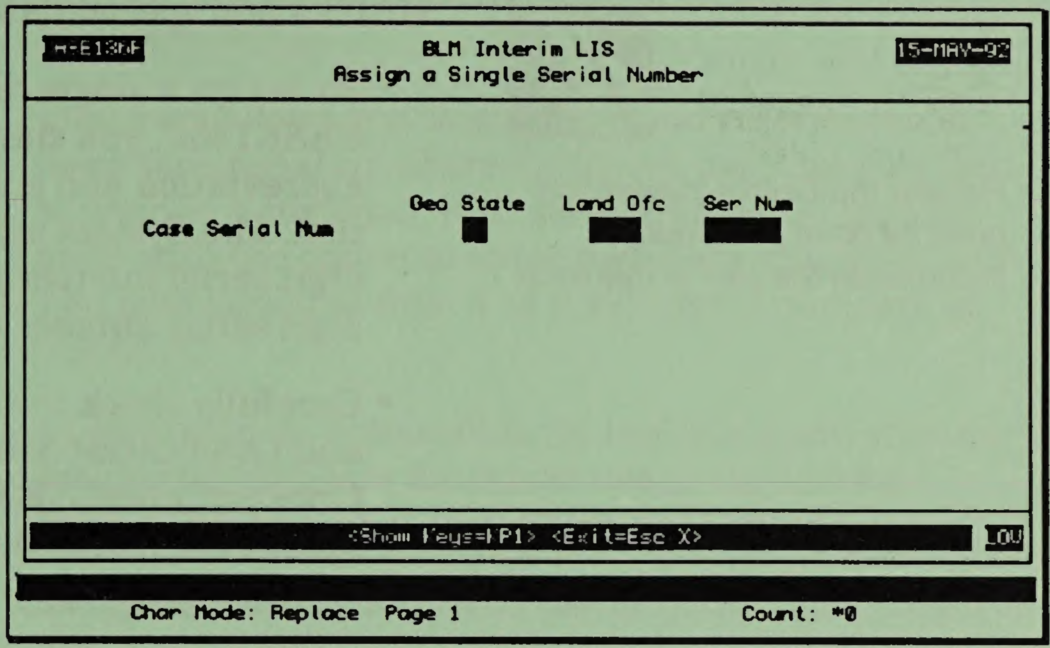
The Assign a Single Serial Number Form consists of a single page containing fields specifically related to the single case serial number created (i.e., assigned) by the form.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Assign a Single Serial Number form.

Use the available training aids as needed.



Emphasize how few fields are on this form and how little information must be entered to use it.

NOTE:

The only fields appearing on this form are those necessary for the assignment of a single case serial number (i.e., Geo State, Land Office, and Serial Number). To assign a serial number with this form, you only need to enter a geographic state abbreviation and land office code.

STEP 1

Enter the appropriate geographic state abbreviation and the land office or mining claim designation for the case serial number being generated. Use the Lists of Values (LOV), if necessary.

Demonstrate and discuss LOV where available.

Check your entered values before proceeding. If you need to return to the Geo State field to alter its value, press PREVIOUS FIELD.

Emphasize that users should check entered values before pressing NEXT FIELD in the Land Office field.

STEP 2

Press NEXT FIELD in the Land Office field to generate the serial number.

The cursor returns to the Geo State field, and the System automatically generates and displays a new six-digit serial number. The following message appears in the message line:

`Serial Number has been generated`

You may now enter another geographic state abbreviation and land office code to generate additional serial numbers if desired.

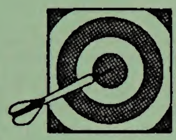
Quirks and special data issues for CASE136F:

Review the Quirks subsection point by point and briefly summarize the use of this form.

- To assign a single case serial number with CASE136F, you simply enter a geographic state abbreviation and a land office/mining claim designation. The System automatically generates the six-digit serial number for you. You never enter a six-digit serial number on this form.
- Carefully check the data you enter in the Geo State and Land Office fields before pressing NEXT FIELD. Once you press NEXT FIELD in the Land Office field, the System automatically assigns a new case serial number.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Assign Single or Multiple Serial Numbers Form (CASE135F)



5 minutes

Review the purpose of the Assign Single or Multiple Serial Numbers form.

Purpose and use of Assign Single or Multiple Serial Numbers Form:

This form allows you to generate and reserve one or more case serial numbers for future use. Use this form to provide a customer with serial number(s) immediately with the option to enter case data at a later time. You may generate from 1 to 9,999 serial numbers at one time.

Review who uses this form and why.

BLM personnel responsible for assigning one or more case serial numbers for future use in the Interim System use this form to perform their tasks.

Review the navigation to this form (including QXFER).

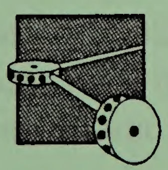
Navigation to this form and use of CASE135F program name in QXFER:

The Assign Single or Multiple Serial Numbers Form (CASE135F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu, then the Assign Multiple Serial Numbers option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE135F program name.

Discuss the data required to use this form.

Required Data you must have to use this form:

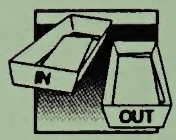
- Geographic State and Land Office (elements of a Case Serial Number).
- The number of new case serial numbers you want to assign.



Review this form's structure and the types of data entered and generated.

Structure of the form:

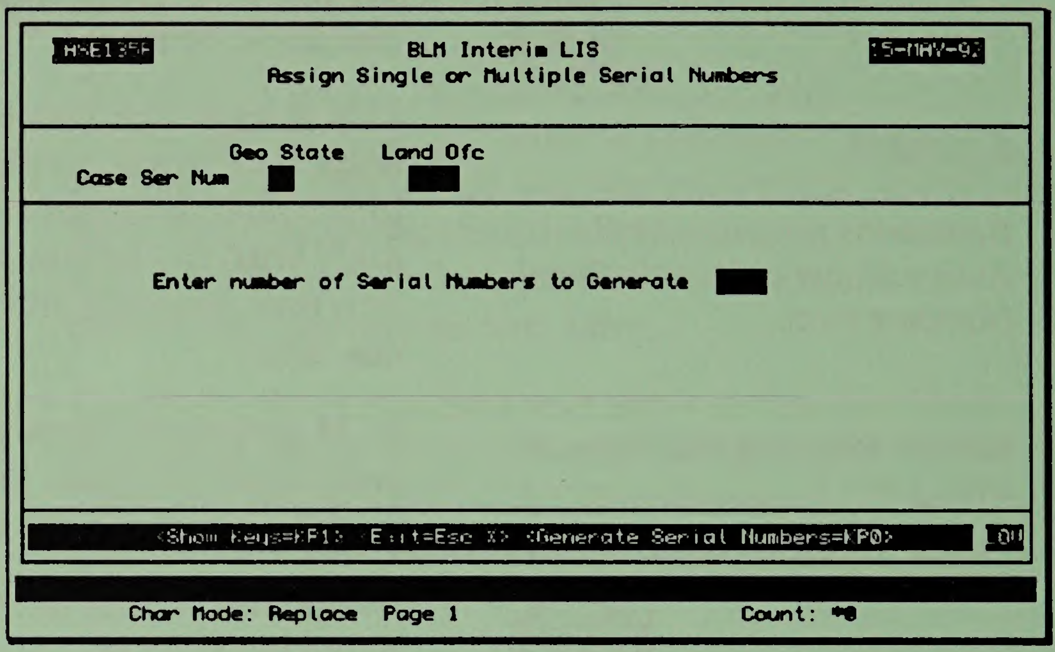
The Assign Single or Multiple Serial Numbers Form consists of a single page containing fields specifically related to the case serial number(s) to be assigned and a field for entering the number of serial numbers (from 1 to 9,999) to be assigned.



Workflow within this form and a review of the form's fields:

Review and demonstrate the step-by-step workflow for the Assign Single or Multiple Serial Numbers form.

Use the available training aids as needed.



STEP 1

Enter the appropriate geographic state abbreviation and land office or mining claim designation common to the case number(s) being generated. Use the Lists of Values (LOV), if necessary.

Demonstrate and discuss LOV where available.

STEP 2

Enter the number of serial number(s) you wish to assign. You must enter a number from 1 to 9,999 (do no include commas).

Emphasize that very little information must be entered to generate multiple serial numbers and that caution should be exercised in using this form.

All case serial numbers assigned will have the geographic state and land office entered on the form. Check your entered values before proceeding. If you need to return to the Geo State and Land Office fields to alter their values, press NEXT FIELD or PREVIOUS FIELD (pressing NEXT FIELD in the Enter number of Serial Numbers to Generate field moves the cursor directly back to the Geo State field).

STEP 3

Once all three fields on the form contain appropriate values, press COMMIT to generate the serial number(s). The following message appears in the message line:

Discuss what happens when COMMIT is pressed once all three fields contain valid data.

```
Generating Serial Numbers: AKxx xxxxxx to
AKxx xxxxxx . . .
Press any function key to acknowledge
message.
```

After you acknowledge this message, the fields clear, the cursor moves to the Geo State field, and the following message appears:

Mention that an off-line report is generated.

```
Serial Numbers Generated. Report Printed.
```

An off-line report is printed as your hardcopy record of this single or multiple serial number assignment. The report lists the first and last case serial numbers of the block generated. If only one serial number is generated, the first and last numbers are identical.

Quirks and special data issues for CASE135F:

Review the Quirks subsection point by point and briefly summarize the use of this form.

- To assign one or more case serial numbers with CASE135F, simply enter a geographic state abbreviation, a land office/mining claim designation, and the number of serial numbers to generate. The System automatically generates the serial number(s) for you.

- Carefully check the data you enter in the Geo State, Land Office and Enter Number of Serial Numbers to Generate fields before pressing COMMIT. Once you press COMMIT, the System automatically assigns the new case serial number(s) you have requested.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Add Block of Previously Serialized Cases Form (CASE148F)

Note:
Review the use of CASE155F and CASE156F on pages 30-56 of this training guide before reviewing this form.

20 minutes

Review the purpose of the Add Block of Previously Serialized Cases form, emphasizing the conditions under which it may be used.

Purpose and use of Add Block of Previously Serialized Cases Form:

This form allows you to enter initial information concerning one or more cases with pre-assigned case serial numbers that do not yet have data in the Interim System. On occasion, an older existing case with a serial number not in the automated System must be entered into the database. In addition, some BLM offices will assign serial number(s) to cases without entering case data at the time of the assignment (e.g., the Alaska Department of Natural Resources receives sets of pre-assigned serial numbers not yet associated with case data). Serial number assignments are made on CASE135F and CASE136F. When information for one or more pre-assigned cases is received by the BLM, the Add Block of Previously Serialized Cases Form is used to input the data for establishing the case(s) in the Interim System.

Emphasize that money actions cannot be entered on this form and that, consequently, mining claim cases cannot be added to the System with this form.

WARNING:

This form does not allow money actions to be entered for any case within a block. Consequently, mining claim cases cannot be added to the System with CASE148F because a money action (B52) is required when mining claims are established.

Emphasize that the use of this form for individual cases within the specified block is virtually identical to the use of CASE155F.

For each previously serialized case within the specified block, the basic functionality of pages 2 through 6 of this form is virtually identical to the functionality of pages 2 through 6 of the Establish Block of New Cases Form (CASE155F).

Emphasize how each case within a block is worked on and committed individually and that data entered for one case is repeatedly carried over (and can be edited) for the next case in the range,

You enter and COMMIT data on this form for one case at a time within the specified range of pre-assigned case serial numbers. After committing data for one case, the form increments the current serial number without deleting data committed for the previous case. In this way, you can add, change and delete data for the next case, and COMMIT its information when correct. Since you do not need to reenter duplicate

information for each consecutive case within the specified range, this form also lets you quickly add multiple cases containing similar information to the database.

Emphasize that this forms allows you to create a suffixed case.

NOTE:
This form allows you to establish a single suffixed case for an existing, unsuffixed serial number. The unsuffixed base case serial number must be established using CASE155F or assigned using CASE135F and CASE136F.

Review who uses this form and why.

BLM personnel responsible for adding initial data for one or more cases having pre-assigned serial numbers use this form to perform their tasks.

Review the navigation to this form (including QXFER).

Navigation to this form and use of CASE148F program name in QXFER:

The Add Block of Previously Serialized Cases Form (CASE148F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu, then the Add Block of Previously Serialized Cases option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE148F program name.

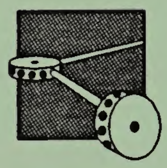
Discuss the data required to use this form. Emphasize the similarities to CASE155F.

Required Data you must have to use this form:

- A range of Case Serial Numbers having the same geographic state and land office/mining claim designation.
- Case Type for each case in the block.
- Customer ID or an established Customer Name and Address for each case.
- Interest Relationship of a customer to each case.
- Land description information (Meridian, Township and Range or County/Borough, and District Office).

NOTE:
Some land descriptions for certain case types require specific survey data (e.g., a mining claim MTRS land descriptions requires survey type 5).

- Employee Initials.
- Action Date and Action Code (all money actions require a money amount).



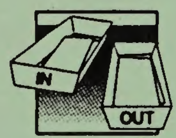
Review this form's structure, emphasizing the similarities to CASE155F.

Structure of the form:

To successfully complete the Add Block of Previously Serialized Cases Form, you must enter data organized into five different categories:

- Case Serial Number Range information for the block.
- Case Header information for each case in the block.
- Customer Link information for each case in the block.
- Case Land information for each case in the block.
- Action information for each case in the block.

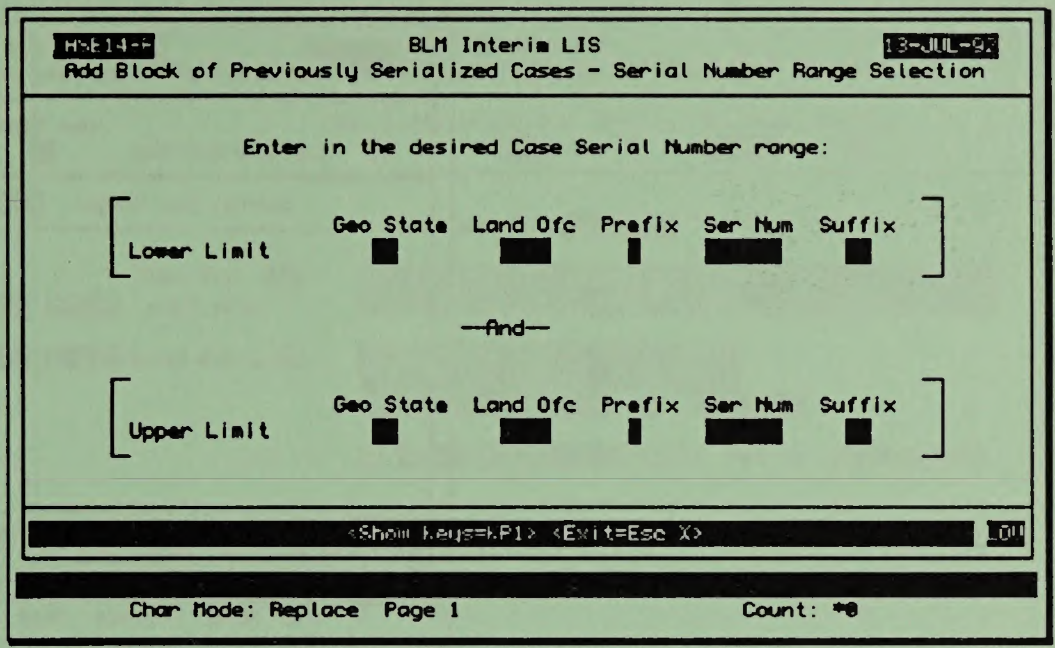
The five categories of data can be entered on six different pages, but because the Comprehensive action page (page 6) is optional, you might not use all six. Depending on the options you choose (based on the action information you need to enter), you may only use five of the six pages in the form.



Briefly review and demonstrate the step-by-step workflow for the Add Block of Previously Serialized Cases form.

Use the available training aids as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Demonstrate and discuss the use of Page 1.

Demonstrate and discuss LOV where available.

Emphasize that all serial numbers in the block must have the same geographic state and land office designation.

Mention that the numbers cannot be linked to existing cases.

Emphasize that a single serial number can be entered as both the lower and upper limit. Also describe how to create a single suffixed case with this form.

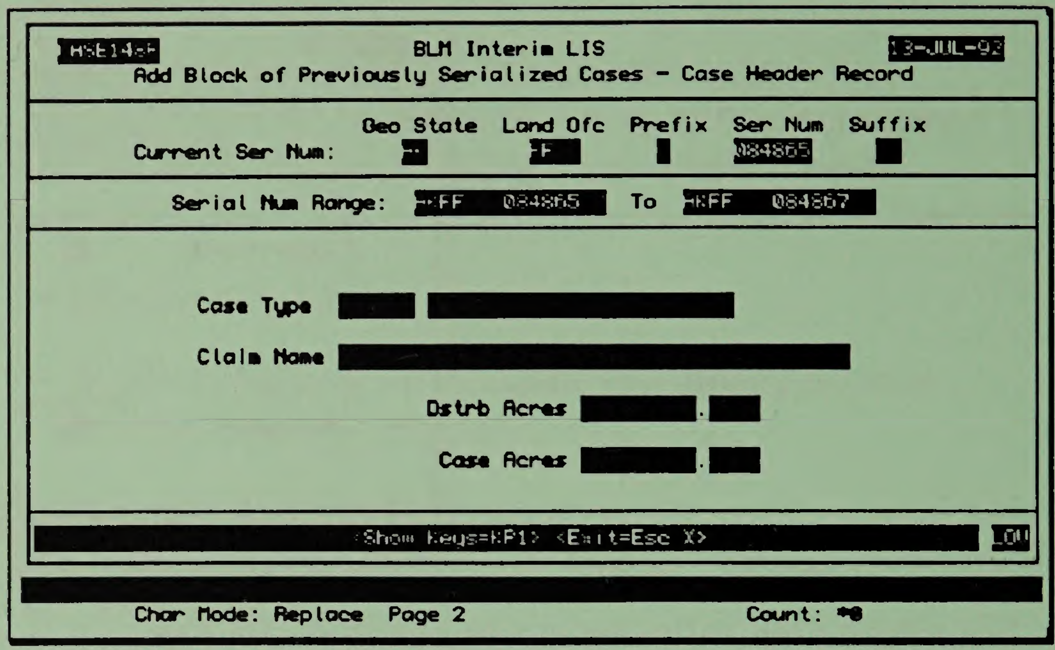
Page 1 allows you to enter the lower and upper limits of the range of previously assigned case serial numbers to which you want case data associated. Enter the lower limit of the sequential range in the top group of Case Serial Number fields on page 1. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Values in the inaccessible Geographic State and Land Office fields for the upper limit automatically default to the those entered for the lower limit.

The serial numbers entered cannot be associated with an existing case in the System, and cannot be greater than the last assigned or generated serial number for the specified geographic state and land office.

The upper and lower limit serial numbers may be the same for a single case.

NOTE:

This form allows you to establish a single suffixed case for an existing, unsuffixed serial number. The unsuffixed base case serial number must be established using CASE155F or assigned using CASE135F and CASE136F. On CASE148, enter the unsuffixed case serial number's values in the lower and upper limit Geographic State, Land Office, Prefix and Serial Number fields, and the desired suffix in the lower and upper limit Suffix fields.



STEP 2

Emphasize the similarities to pages 2 - 6 of CASE155F.

Demonstrate and discuss the use of Page 2 to enter case header data for the current case.

Review each data element on the page and emphasize the similarities to Page 2 of CASE155F.

Page 2 allows you to enter required case header information for the current case serial number in the block. The current serial number appears at the top of the page along with the serial number range specified on page 1.

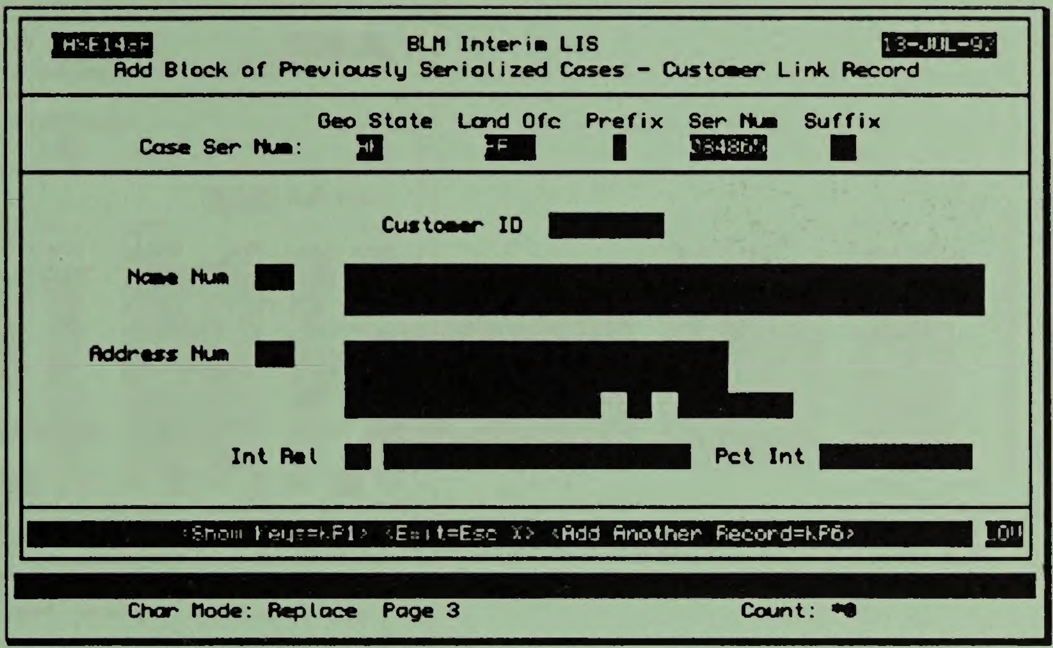
The lower portion of page 2 contains fields for case header data for the block of cases.

NOTE:

Mining claim case types (384xxx) cannot be added to the System with this form.

For each current case serial number, the use of this page is identical to the use of page 2 (Case Header page) on CASE155F.

Enter the appropriate case type, claim name (for mining claims), disturbed acres (for surface management cases), and case acres for the current case serial number in the range.



STEP 3

Demonstrate and discuss the use of Page 3 to link a customer to the current case.

Review each data element on the page and emphasize the similarities to Page 3 of CASE155F.

Emphasize that CUST100F can only be accessed for the first case of the block.

Page 3 allows you to enter required customer information associated with the current case serial number in the block. The current serial number appears at the top of the page.

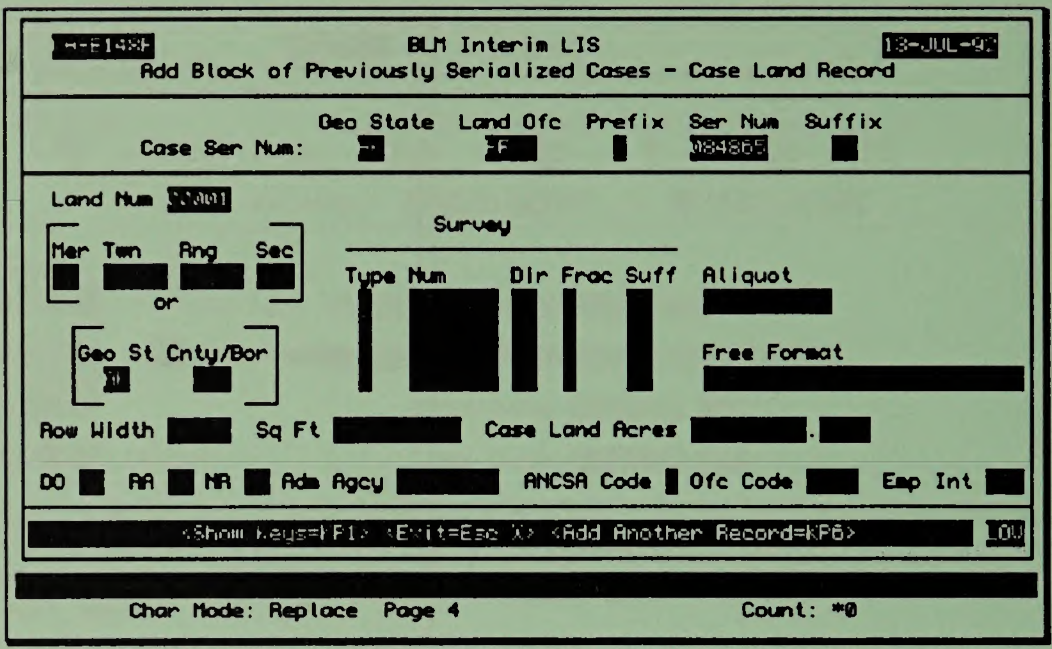
If needed, you may use this page repeatedly to enter multiple customers for the case. You may also access CUST100F from the Customer ID field, if necessary.

NOTE:

CUST100F can only be accessed for the first case within the block. While you may enter different customer ID's for each subsequent case, you cannot access CUST100F from CASE148F to add a new customer to the System for these cases.

For each current case serial number, the use of this page is identical to the use of page 3 (Customer Link page) on CASE155F, except as noted above.

Enter the appropriate customer ID, name number, address number, interest relationship and percent interest for the customer(s) you want to link to the current case.



STEP 4

Demonstrate and discuss the use of Page 4 to enter case land data for the current case.

Review each data element on the page and emphasize the similarities to Page 4 of CASE155F.

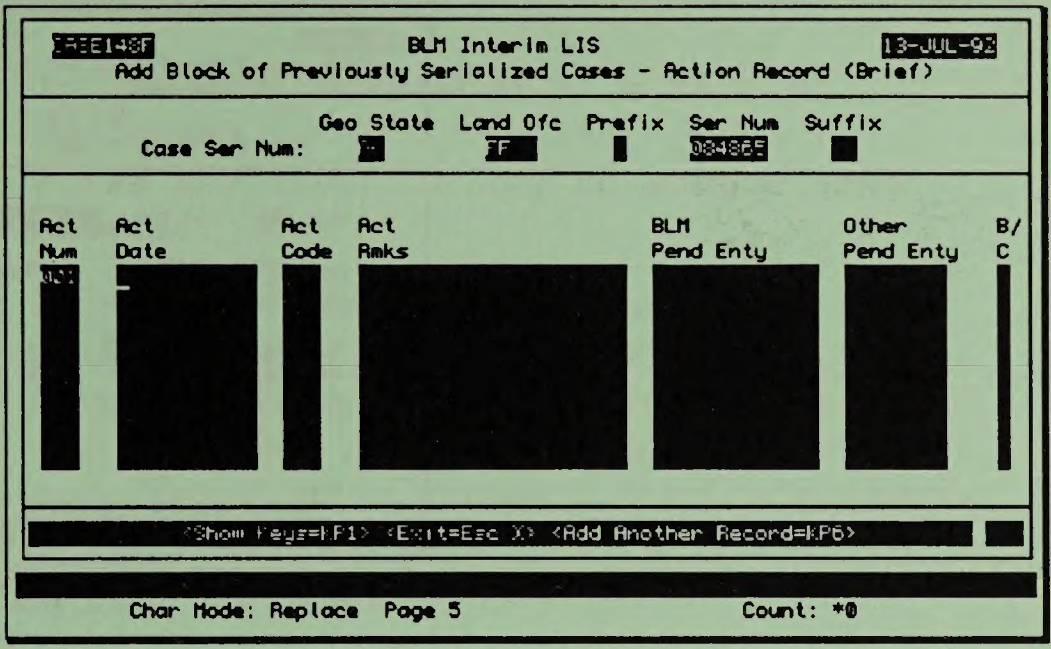
Page 4 allows you to enter case land description information for the current case serial number in the block. The current serial number appears at the top of the page.

If needed, you may use this page repeatedly to enter multiple case land descriptions for the case.

For each current case serial number, the use of this page is identical to the use of page 4 (Case Land page) on CASE155F.

Enter the appropriate case land description information, including: meridian, township, range and section; geographic state and county/borough; survey type, number, direction, fraction and suffix; aliquot part; free format data; right-of-way width; square feet and case land acres; BLM District and Resource Are; Native Region; administrative agency; office code and initials.

Employee initials are required in Alaska.



STEP 5

Demonstrate and discuss the use of Page 5 to enter brief action data for the current case.

Review each data element on the page and emphasize the similarities to Page 5 of CASE155F.

Emphasize that money actions cannot be added on this form and that money actions must be added through Accounting Advice forms.

Page 5 (Brief action page) allows you to enter required brief action information for the current case serial number in the block. The current serial number appears at the top of the page.

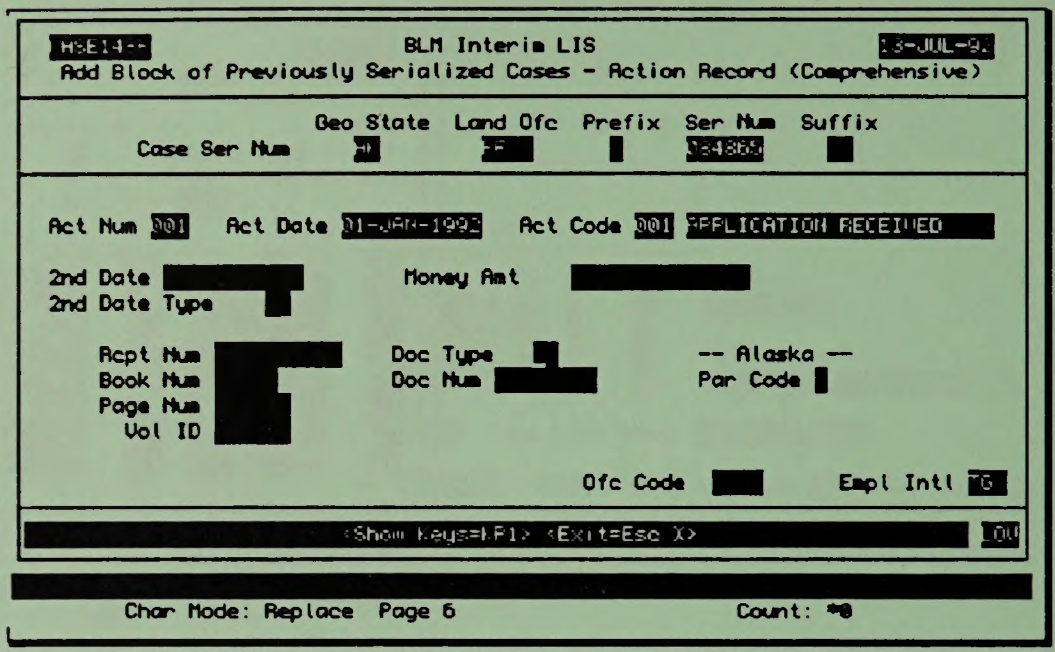
You may enter multiple actions for the current case on this page. Each action record is displayed on a separate line. For each action record you enter on page 5, you have the option of entering additional information on page 6 (Comprehensive action page).

NOTE:

You may not enter money actions on CASE148F.

For each current case serial number, the use of this page is identical to the use of page 5 (Brief Action page) on CASE155F, except as noted above.

Enter applicable action dates, action codes, action remarks, BLM pending entity codes and other pending entity codes for the current case serial number.



STEP 6

Demonstrate and discuss the use of Page 6 to enter comprehensive action data for the current case.

Review each data element on the page and emphasize the similarities to page 6 of CASE155F.

Mention that the Money Amount field is inaccessible on this form.

Page 6 (the Comprehensive page) allows you to add more detailed data for the current action on page 5 within the current case serial number. The current serial number appears at the top of the page.

Cursor movement and field access on page 6 are determined by the case type/action code of the current record.

For each current case serial number, the use of this page is identical to the use of page 6 (Comprehensive Action page) on CASE155F.

If appropriate, enter second date and second date type, county courthouse or recording district filing information, document type and number, and Alaska parcel code data.

STEP 7

Emphasize that COMMIT must be pressed for each case, one at a time, within the range.

Once you enter valid data for the current case into all mandatory fields on this form, press COMMIT to establish the case in the database. You may COMMIT the data for the current case from any page of the form (except page 1).

NOTE:

You must press COMMIT for each case in the range. You cannot move to the next case until the current case is committed to the database.

The following message appears on the page on which COMMIT is pressed:

```
Transaction completed -- x records
processed.
Press any function key to acknowledge
message.
```

Demonstrate and discuss what happens when COMMIT is pressed for the last case in the range.

If the current case is the last serial number in the range entered on page 1, the cursor returns to the Geographic State field for the lower limit case serial number on page 1 when you acknowledge this message. None of the information entered on this form's pages for the previously entered range is cleared. Reenter a new range, or press EXIT.

Demonstrate and discuss what happens when COMMIT is pressed for a case at the beginning of or in the middle of the range.

If there are more serial numbers in the range entered on page 1 for which case data needs to be added, the cursor returns to the Case Type field on page 2 when you acknowledge this message. The next sequential case serial number in the range specified on page 1 becomes current and is displayed at the top of page 2.

Thoroughly review the procedure for adding, changing and deleting a previous case's data for the current case. Demonstrate using NEXT/PREVIOUS BLOCK to move from page to page.

All data committed for the previous case remains on pages 2 through 6, and you may add, change and delete this data, as needed for the new current case. Use NEXT/PREVIOUS BLOCK to quickly move from page to page to make the necessary changes, and COMMIT data for the current case from any page (except page 1) when it is correct. Since you do not need to reenter duplicate information for each consecutive case within the specified range, this form also lets you quickly add multiple cases containing similar information to the database.

Review the Quirks subsection point by point and briefly summarize the use of this form.

Quirks and special data issues for CASE148F:

- This form allows you to enter initial information concerning one or more cases with pre-assigned case serial numbers that do not yet have data in the Interim System.

- This form does not allow money actions to be entered for any case within a block. Consequently, mining claim cases cannot be added to the System with CASE148F because a money action (`B52`) is required when mining claims are established.

- You enter and COMMIT data on this form for one case at a time within the specified range of pre-assigned case serial numbers. After committing data

for one case, the form increments the current serial number without deleting data committed for the previous case. In this way, you can add, change and delete data for the next case, and COMMIT its information when correct. Since you do not need to reenter duplicate information for each consecutive case within the specified range, this form also lets you quickly add multiple cases containing similar information to the database.

- Case serial numbers specified on page 1 must have the same geographic state and land office designation. Specified serial numbers cannot be associated with an existing case in the System, and cannot be greater than the last assigned or generated serial number for the specified geographic state and land office.
- The upper and lower limit serial numbers may be the same for a single case.
- This form allows you to establish a single suffixed case for an existing, unsuffixed serial number. Enter the unsuffixed case serial number's values in the lower and upper limit Geographic State, Land Office, Prefix and Serial Number fields, and the desired suffix in the lower and upper limit Suffix fields.

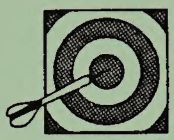
NOTE:
Many of the Quirks and special data issues present on pages 2 through 6 of CASE148F are identical to quirks and data issues present on pages 2 through 6 of CASE155F.

- For each previously serialized case within the specified block, the basic functionality of pages 2 through 6 of this form is virtually identical to the functionality of pages 2 through 6 of the Establish Block of New Cases Form (CASE155F).
- CUST100F can only be accessed for the first case within the block. While you may enter different customer ID's for each subsequent case, you cannot access CUST100F from CASE148F to add a new customer to the System for these cases.
- You may not enter money actions on CASE148F.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

- You must press COMMIT for each case in the range. You cannot move to the next case until the current case is committed to the database.

Establish Block of New Cases and Generate Accounting Advice Forms (CASE155F & CASE156F)



1.5 hours
(including Exercise G-1)

Note:
Review the use of this form and CASE156F* before *reviewing CASE148F.

Review the purpose of both the Establish Block of New Cases and the Generate Accounting Advice forms.

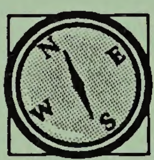
Purpose and use of the Establish Block of New Cases and Generate Accounting Advice Forms:

These two forms allow you to establish a block of new, identical cases within the System and, if needed, generate an accounting advice receipt for money actions within the block of cases.

When you choose the Establish Block of New Cases and Generate Accounting Advice option from the Restricted Case Processing Menu, you initially access the Establish Block of New Cases Form (CASE155F). If, and only if, you enter a money action record for the block of cases on CASE155F, you automatically access the Generate Accounting Advice Form (CASE156F). This is the only way CASE156F can be accessed within the System.

Review who uses these forms and why.

BLM personnel responsible for establishing a block of identical land or mineral cases in the System and, if needed, generating an accounting advice receipt for the block use these two forms to perform their tasks.

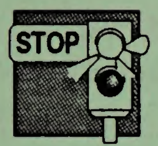


Review the navigation to CASE155F (including QXFER). Emphasize that CASE156F can only be accessed when money actions are entered for the block of new cases on CASE155F.

Navigation to these forms and use of CASE155F program name in QXFER:

The Establish Block of New Cases and Generate Accounting Advice Forms (CASE155F & CASE156F) are an option on the Restricted Case Processing Menu. They are accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu and then the Establish Blk of New Cases, Gen Acct Adv option from the Restricted Case Processing Menu. These forms can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE155F program name.

NOTE:
CASE156F can only be accessed through CASE155F when money action(s) are entered for a block of new cases. You cannot access the Generate Accounting Advice Form (CASE156F) by using its program name in the QXFER field.



Discuss the data required to use CASE155F. Emphasize that some land description and action entries cause normally optional fields to become mandatory.

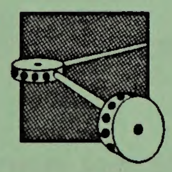
Emphasize that data for four records must be entered before information can be committed: Case Header record, Case Customer record, Case Land record and Action record.

Required data you must have to use the Establish Block of New Cases Form (CASE155F):

- Geographic State abbreviation and Land Office/ Mining Claim designation of the Case Serial Numbers within the block of new cases.
- Case Type for the cases within the block.
- Customer ID or an established Customer Name and Address for the cases within the block.
- Interest Relationship of the customer to these cases.
- Land description information (Meridian, Township and Range or County/Borough, and District Office code).

NOTE:
Some land descriptions for certain case types require specific survey data (e.g., a mining claim MTRS land descriptions requires survey type 5).

- Employee Initials.
- Action Date and Action Code (all money actions require a money amount).



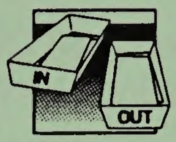
Review this form's structure and the types of data entered and retrieved.

Structure of the Establish Block of New Cases Form (CASE155F):

To successfully complete the Establish Block of New Cases Form, you must enter data organized into five different categories:

- Geographic State abbreviation and Land Office designation of the case serial numbers to be generated for the block of cases to be established, as well as the number of cases within the block.
- Case Header information.
- Customer Link information
- Case Land information.
- Action information.

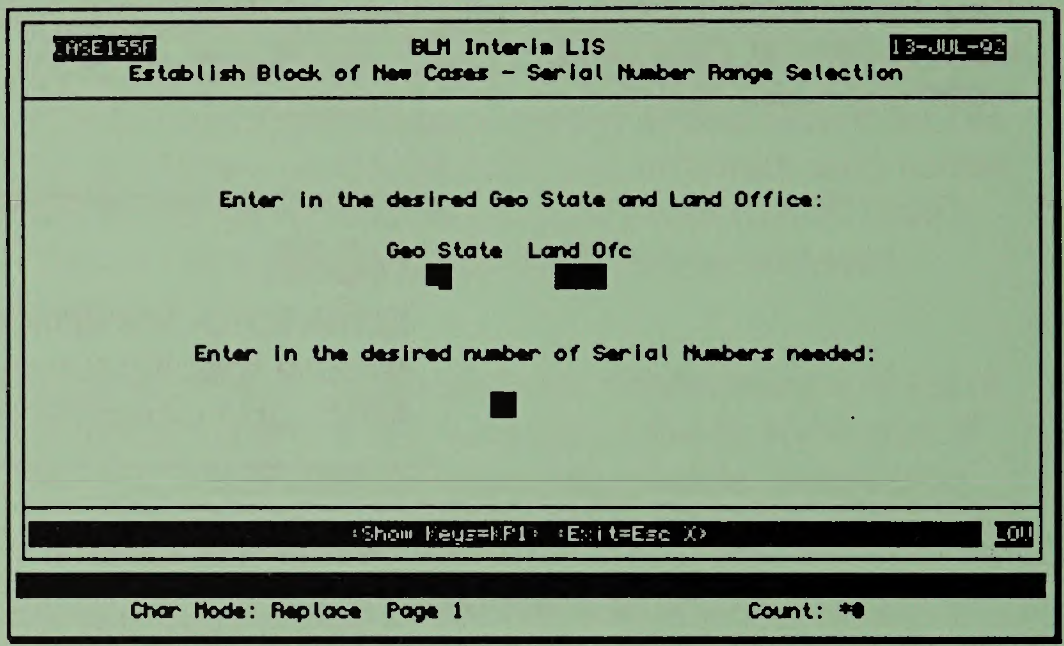
The five categories of data can be entered on six different pages, but because the comprehensive action page (page 6) is optional, you might not use all six. Depending on the options you choose (based on the action information you need to enter), you may only use five of the six pages in the Establish Block of New Cases Form.



Workflow within the Establish Block of New Cases Form (CASE155F) and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the Establish Block of New Cases form.

Use the available training aids as needed.



STEP 1

NOTE:

All of the case serial numbers generated with this form are within a sequential range of numbers having the same geographic state and land office/mining claim designation.

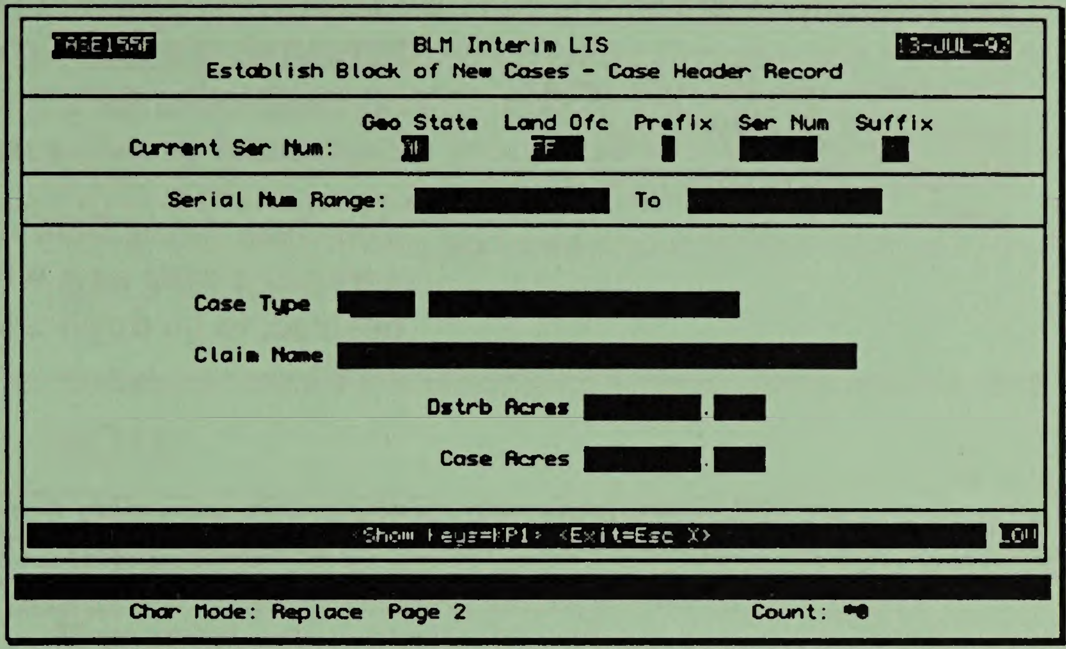
Demonstrate and discuss the use of Page 1, emphasizing that all case serial numbers within the block will have the same geographic state and land office designation.

Demonstrate and discuss LOV where available.

Mention that up to 99 identical cases can be established with this form.

Enter the geographic state abbreviation and land office/mining claim designation of the case serial numbers to be generated for the block of cases being established. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Enter the number (from 1 to 99) of identical cases to be established in the block.



STEP 2

Emphasize that data entered on pages 2-6 are duplicated for each case in the block.

NOTE:

Data entered on pages 2 through 6 of this form are duplicated for each identical case within the block of cases being established.

Demonstrate and discuss the use of Page 2 to enter case header data. Review each data element on the page.

Page 2 allows you to enter required case header information for the block of identical cases. At the top of page 2, the Current Serial Number's Geographic State and Land Office fields reflect the values entered on page 1. The rest of the Current Serial Number and Serial Number Range fields at the top of page 2 are blank.

The lower portion of page 2 contains fields for case header data for the block of cases.

Enter the required case type for each case within the block. Use the List of Values (LOV), if necessary.

Discuss the access and use of the Claim Name field. Mention that, for mining claims, the cursor skips to Page 3 after Claim Name.

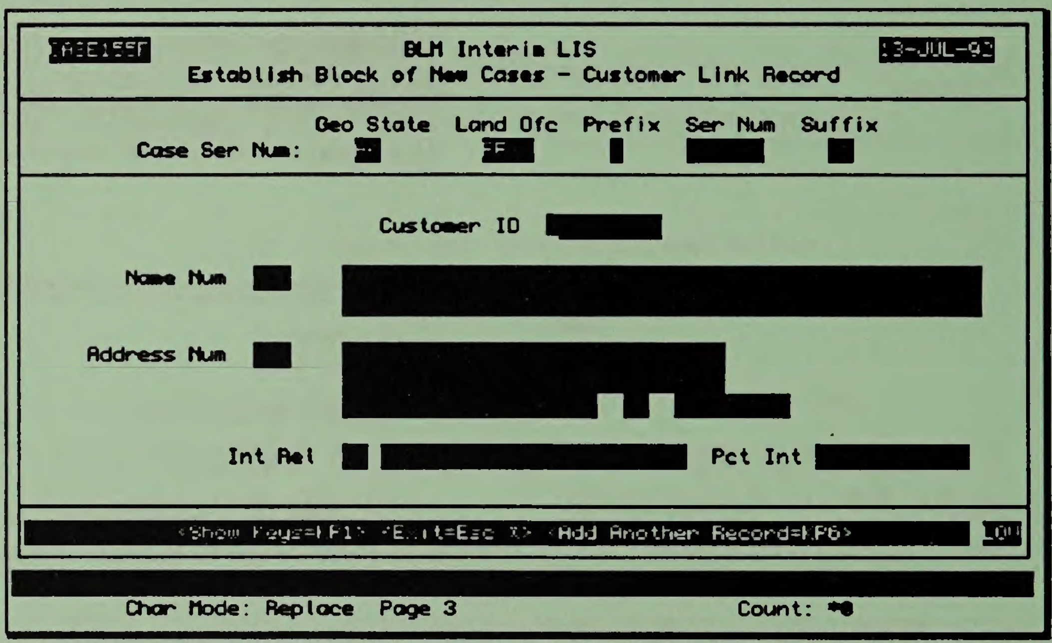
For mining claim case types, the cursor moves to the optional Claim Name field. Enter a claim name, if desired, to be duplicated in each case within the block. Pressing NEXT FIELD skips the remaining fields on page 2 and moves the cursor to the Customer ID field at the top of page 3; use PREVIOUS FIELD or PREVIOUS BLOCK to return to page 2, if necessary.

Discuss the access and use of the Disturbed Acres field.

For surface management case types, the cursor may move to the optional Disturbed Acres field; press PREVIOUS FIELD if necessary. Enter a whole and/or decimal value for disturbed acres, if desired, to be duplicated in each case within the block.

Emphasize that the case acres value is for an entire case. Compare this to case land acres.

The Case Acres field allows you to enter the number of acres in a case as a whole. Enter a case acres value, if desired, to be duplicated for each case within the block.



STEP 3

Page 3 allows you to enter required information concerning customer(s) associated with the block of identical cases. If needed, you may use this page repeatedly to enter multiple customers for the block of cases. At the top of page 3, the Current Serial Number's Geographic State and Land Office fields reflect the values entered on page 1.

Demonstrate and discuss the use of Page 3 to link a customer to the cases in the block. Review each data element on the page.

Enter a customer ID. The System automatically completes the Name Number and Address Number fields, defaulting to the lowest name and address numbers from the customer database within the Customer ID entered.

Discuss and demonstrate using the Customer Information screen, including entering and executing a query using the optional wildcard character.

If you know the name of a customer you want linked to the block of cases, but do not know their ID number, press List of Values (LOV) in the Customer ID field and access the Customer Information screen (DICT138F). Move to the Customer Name field, enter the name as it would be stored in the database, and press EXECUTE QUERY. Use the wildcard character,

%, in the name, if necessary. The System retrieves all names in the database that match the name entered, and you may scroll through them one at a time using NEXT/PREVIOUS RECORD. When you locate the customer you want to link to the block of cases, press NEXT FIELD to return the displayed customer ID, name, name number, address and address number to page 3 of CASE155F.

Demonstrate and discuss the procedure for accessing CUST100F and returning a newly added customer's data to CASE155F.

NOTE:
If you need to add a new customer to the customer section of the Interim System database, and you have System privileges to do so, press NEXT FIELD in the Customer ID field on page 3. Work on CASE155F is temporarily suspended, and you move to the Add/Delete Customer Form (CUST100F). Refer to those portions of the Interim System Documentation Library concerning Customer Processing for detailed information on the use of CUST100F. When you COMMIT data for a new customer on CUST100F, the System returns this information to the appropriate fields on page 3 of CASE155F, and work on the Establish Block of New Cases Form resumes.

Briefly review the Customer, Name and Customer Address Information screens.

You may change the automatically retrieved name and address numbers to retrieve other names and addresses, if present, within the Customer ID. There are LOV screens accessible from the Name Number field (Customer Name Information, DICT139F) and the Address Number field (Customer Address Information, DICT140F). These screens function like the Customer Information screen, allowing you to scroll through multiple names or addresses, if present, within the specified customer ID, and retrieve them for the appropriate fields on page 3 of CASE155F.

Enter the required interest relationship and optional percent interest for the customer being linked to the block of cases.

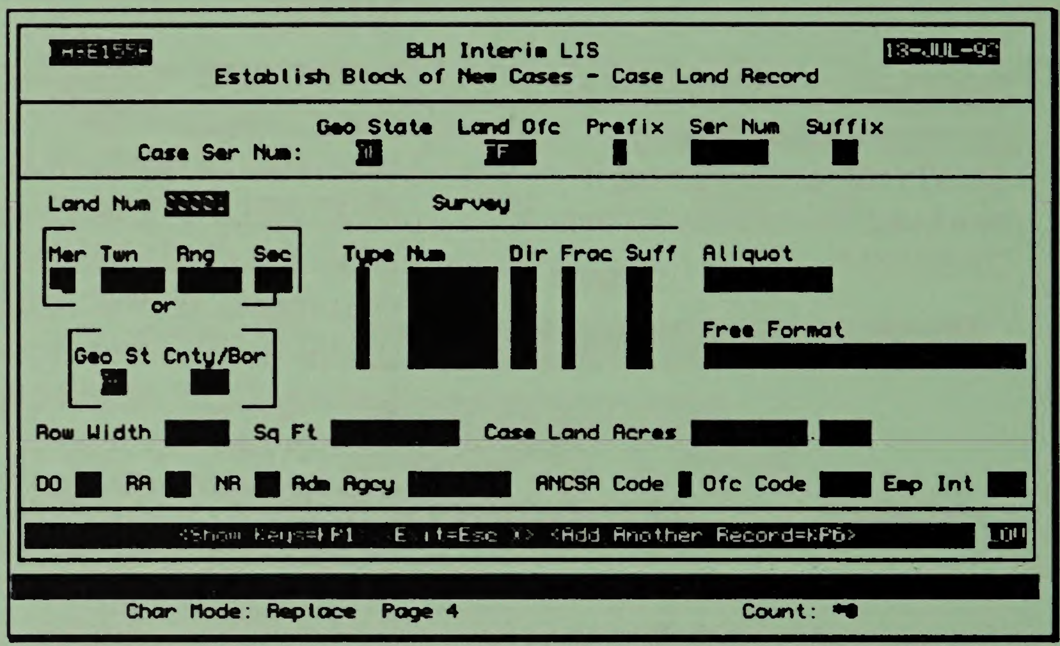
Emphasize that multiple customers may be linked to the cases in the block.

To link another customer to the block of cases, press CREATE RECORD or NEXT RECORD once an interest relationship for the current customer is specified. Data for the current customer clears from page 3 so that you may enter data for the next customer.

NOTE:

Once all of the required fields on a page are filled, you may use NEXT/PREVIOUS BLOCK to quickly move back and forth between completed pages on this form (excluding page 1), adding, changing and deleting data as needed.

Demonstrate the use of NEXT/PREVIOUS BLOCK to move between pages on CASE155F.


BLM Interim LIS
Establish Block of New Cases - Case Land Record
Geo State Land Ofc Prefix Ser Num Suffix
Case Ser Num:
Land Num
Survey
Mer Twn Rng Sec
or
Type Num Dir Frac Suff Aliquot
Free Format
Geo St Cnty/Bor
Row Width Sq Ft Case Land Acres
DO RA NR Adm Agcy ANCSA Code Ofc Code Emp Int
<Add Another Record=KP6>
Char Mode: Replace Page 4 Count:

STEP 4

Page 4 allows you to enter case land description information for the block of cases being established. If needed, you may use this page repeatedly to enter multiple case land descriptions for the block of cases. At the top of page 4, the Current Serial Number's Geographic State and Land Office fields reflect the values entered on page 1.

Demonstrate and discuss the use of Page 4 to enter case land data.

Mention that land numbers are automatically generated.

This form automatically generates a land number (beginning with 00001) for each land description entered for the block of cases. The unique land number associated with each land in a case is vital for linking case lands to actions and setting case land status.

Thoroughly discuss the action/land relationships automatically created (and not created) with CASE155F.

NOTE:

Each case land record entered on this form is linked automatically to any **001 - APPLICATION RECEIVED/CASE ESTABLISHED** action records (**B52 - LOCATION NOTICE FILED** action records in Alaska mining claim cases) entered on pages 5 and 6 within each case in the block. Other land actions entered are not linked to case lands entered on this form.

Stress the possible need to use CASE101F after this form to make action/land ties in each case in the block.

Immediately after using this form to establish new cases, you may need to use the Update Action/Land Relationship Form (CASE101F) to link case lands entered on CASE155F to the appropriate land action(s) in each case within the block. Creating action/land relationships between case lands and the appropriate land action(s) is required for the System to automatically set case land status.

Explain that, for Alaska Native Allotment cases having multiple `001` *actions for multiple parcels, the easiest method for using CASE155F is to enter just one* `001` *action and the case land(s) for the appropriate parcel.*

For Alaska Native Allotments containing multiple **001** actions, all **001** actions entered on this form are tied to all case lands entered. To avoid confusion, it may be simpler to add case land description(s) for a single parcel on this form, and the one **001** action applying to that parcel. Use the Update Action Form (CASE127F), the Update Case Land Records Form (CASE125F) and the Update Action/Land Relationship Form (CASE101F) to enter the rest of the lands and actions and create the ties between them for each case.

Demonstrate entering MTRS data.

If the block of cases is in a Public Land Survey System (PLSS) state, enter the meridian code, township and range designations, and section number for the land description. Use the List of Values (LOV) available in the Meridian field, if necessary. If the block of cases are in a non-PLSS state, press NEXT FIELD in the blank Meridian field, and skip to the County/Borough field.

Briefly review the three special meridian codes.

There are three special meridian codes of which you should be familiar. Meridian code **00** is used only in cases that will never have a land description. Meridian code **98** is used only to identify lands having invalid meridian/township/range/section descriptions.

Meridian code **99** is used only to identify lands in cases where valid LLD data does not yet exist, but will in the future. Codes **00** and **99** cause the Township, Range and Section fields to fill automatically with zeros, and move the cursor to the Office Code field at the bottom of the form. For meridian code **98**, you must enter township, range and section data, even though these data are invalid.

Briefly review the structure and format of the Township and Range fields. Describe the options available in the section field.

Although the five-character Township and Range fields each look like one field, they are actually divided into three separate sections. The first section is for the three-digit township or range number. While this section zero-fills if you enter the number and press NEXT FIELD, it may be less confusing to enter leading zeros where needed (e.g., **003, 037**). The second section of the Township and Range fields is for the single-digit fractional code of the township or range (**0** = no fraction, **1** = 1/4, **2** = 1/2, **3** = 3/4); the fractional code is usually zero. The third section is for the single-character direction of the township or range (**N**, **S**, **E**, or **W**).

Once you have entered meridian, township and range data, entering a section number is optional; if you leave this field blank, it fills automatically with zeros. If you enter **999** (the code for an entire township) in the Section field, **ENTIRE TOWNSHIP** will be printed on case abstracts following the specified meridian, township and range information.

Describe how the MTRS entered is validated by LLD information and how fields on the page may fill with data pulled from LLD.

When you press NEXT FIELD in the Section field, the meridian, township, range and section combination are validated against the System's legal land description (LLD) information. In addition, various fields on the form (e.g., County/Borough, District Office and Administrative Agency) may automatically fill with values pulled from the System's legal land description (LLD) data.

The Geographic State field automatically fills with the proper code.

If you did not enter meridian, township and range data (e.g., in a non-PLSS state), a County/Borough code is required. If you entered MTR data, this optional field may already contain a value; if the county/borough code is missing or incorrect, enter the appropriate code if desired. Use the List of Values (LOV), if necessary.

Discuss and demonstrate how case type and MTRS data can cause the form to skip and/or require the remaining fields on Page 4.

NOTE:
Depending on the case type and MTRS entered for this land description, the System may skip or require various fields on this form, including: Survey Type, Survey Number, Direction, Fraction and Suffix, Aliquot Part, Free Format, ROW Width, and Square Feet.

Some case types allow only a certain survey type code to be entered.

Emphasize that some case types require a certain survey type. Mining claims require survey type 5, for example.

Enter a survey type code, if appropriate, and enter all applicable survey data into the Survey fields (Survey Number, Direction, Fraction and Suffix), the Aliquot Part field and the Free Format field. Cursor movement and access to these fields are dependent on the case type and survey type entered. The cursor automatically skips fields not normally entered for a given survey type. If you need to enter data into a skipped field, use PREVIOUS FIELD to move back. Some survey types may require a survey number, an aliquot part or other data; other survey types may simply warn you if you skip fields normally required for that survey type. You may enter up to four lines of survey information for nested surveys (e.g., a lot within a block within a townsite), but most land descriptions use only the first line of Survey fields.

Mention that the ROW field is accessible only for ROW cases.

The Right-of-Way Width field is accessible only for right-of-way case types, and is used for the width of a right-of-way corridor described by the case land record. Enter the right-of-way width, if appropriate.

Discuss the relationship between the Square Feet and Case Land Acres fields.

The cursor normally skips the Square Feet field, and moves to the Case Land Acres field. For most case land records, enter the number of acres described. To access the Square Feet field, press PREVIOUS FIELD in the Case Land Acres field. You can enter a value in the Square Feet field or the Case Land Acres field, but not both. If you enter a square feet value, the System automatically determines and fills in the value of the Case Land Acres field. While you can type over an automatically calculated case land acres value, the number you enter is replaced by the number automatically calculated from the Square Feet value when you press NEXT FIELD.

The BLM District Office and Resource Area fields may contain codes pulled from the System's LLD data based on the MTRS data entered. If these codes are incorrect or are necessary but missing, enter the appropriate codes. Use the Lists of Values (LOV) available, if necessary.

The Native Region field is for Alaska only, and is used to identify the native region in which the case land description falls. Enter the region code, if needed. Use the List of Values (LOV), if necessary.

The Administrative Agency field may contain a code pulled from the System's LLD data based on the meridian, township, range and section data entered. If the code is incorrect or is necessary but missing, enter the appropriate code. Use the List of Values (LOV), if necessary.

The ANCSA code field is for Alaska Native Allotment cases only, and is inaccessible on this form.

Emphasize that the ANCSA Code field is inaccessible on this form. Mention that ANCSA Codes should be added to lands using CASE125F.

NOTE:

ANCSA codes recognizing surface/subsurface claims on various estates (e.g., villages and native regions) for a patented or internally conveyed land should be added to the land record using the Update Case Land Record Form (CASE125F).

Emphasize that initials are required in Alaska.

Enter your office code and initials, or the office code and initials of the employee who made the decisions regarding this case land description.

Employee Initials are required in Alaska.

Emphasize that multiple case lands may be entered for the cases in the block.

To add another case land description for the block of cases, press CREATE RECORD once employee initials are specified for the current land. Data for the current case land description clears from page 4 so that you may enter data for the next case land.

Mention how to use DUPLICATE RECORD to save time and effort.

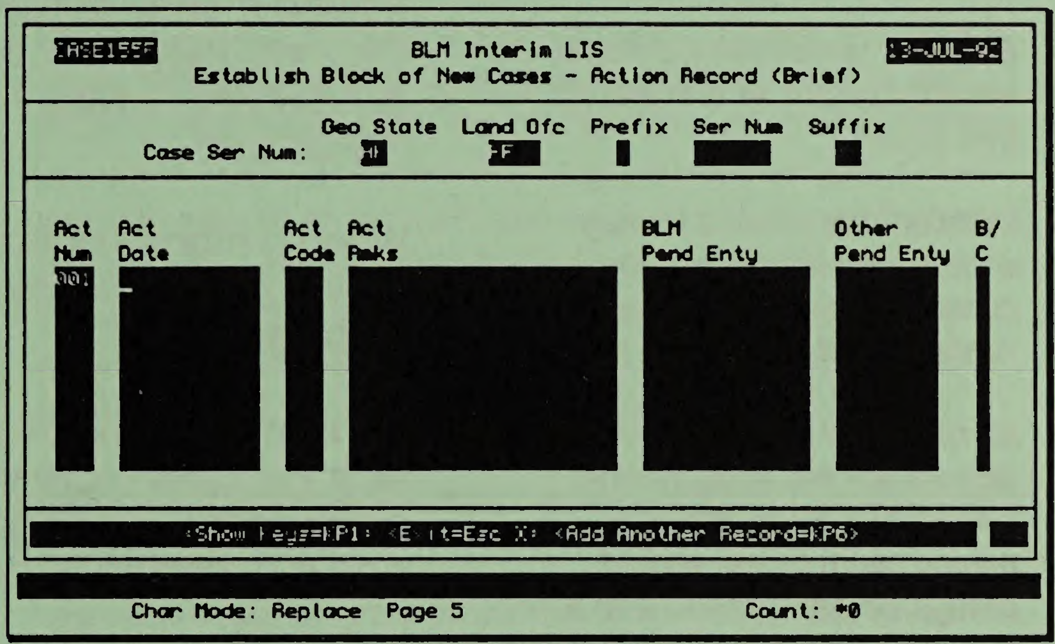
If you are entering a land description with field values similar to those of one already entered on this form, display the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can move around the

page, adding, changing and deleting data as needed. This procedure can save you from reentering identical land information over and over again.

Warn students that, if the computer goes down during a query of a large number of case land records, all data is lost. Emphasize that data cannot be committed until all the required fields (including the action fields) are filled.

NOTE:

If the computer goes down before you COMMIT data entered on this form, none of your input for the block of cases is saved. Depending on your situation, it may be wise to limit the number of case lands entered on this form, and use the Update Case Land Records Form (CASE125F) to enter large numbers of case land descriptions.



STEP 5

Page 5 (Brief action page) allows you to enter required brief action information for the block of cases being established. At the top of page 5, the Current Serial Number's Geographic State and Land Office fields reflect the values entered on page 1.

Demonstrate and discuss the use of Page 5 to enter brief action data. Review each data element on the page.

You may enter multiple action records on this page. Each record is displayed on a separate line. For each action record entered on page 5, you have the option of entering additional information on page 6 (Comprehensive action page).

Discuss how multiple actions can be entered on Page 5 and that detailed data for each individual action can be entered on Page 6.

Mention that action numbers are automatically generated.

This form automatically generates an action number (beginning with `001`) for each action entered for the block of cases. The unique action number associated with each action in a case in the block is vital for linking action to case lands.

Remind students that action codes are case type sensitive.

Review information found on the Action Code LOV.

Enter the required action date and code for the record. Remember that the case type determines which action codes are valid. Use the List of Values (LOV) available in the Action Code field, if necessary. The action code LOV indicates if action codes are money actions, effect case status, allow second date types (and, if so, which ones), require pending entities, etc....

NOTE:

Emphasize that refund money actions cannot be entered on this form.

Refund money action codes are not accepted on this form. Refunds should be handled on the Accounting Advice Transaction Transfers Form (CASE163F).

Mention that when a money action code is entered, the cursor moves to the Money Amount field on Page 6.

When a money action code is entered, the cursor moves automatically to the Money Amount field on page 6.

Mention that certain duplicate actions are not accepted for some case types and that mining claim cases should always be established with a **B52** *and* **906** *action.*

For some case types, certain action codes cannot exist in a case more than once (e.g., **B52** in mining claim cases). An error occurs if you attempt to add a duplicate code under these conditions.

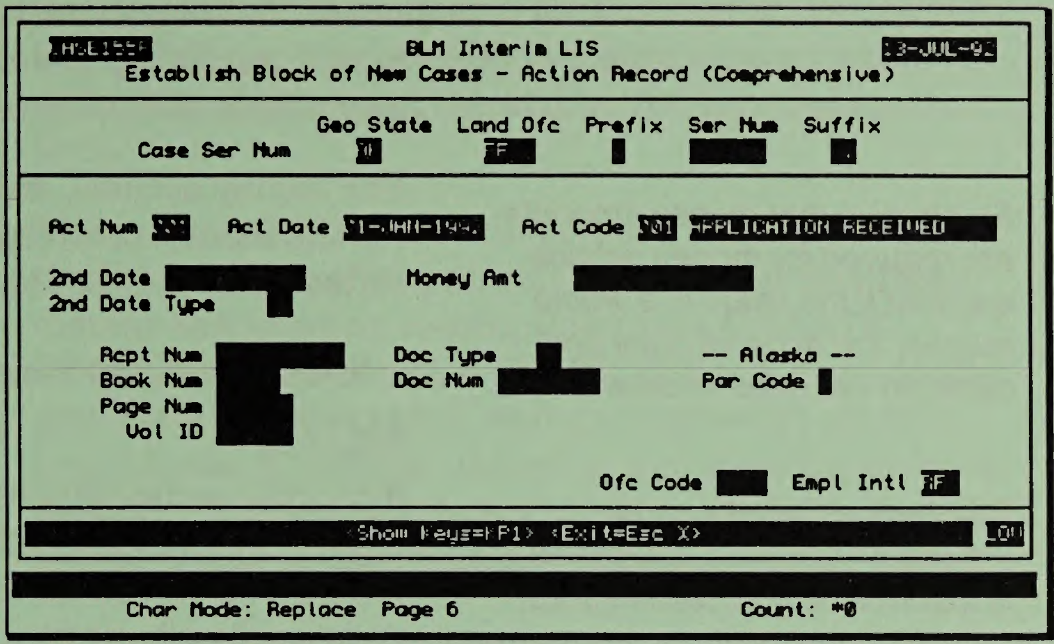
Two action codes should always be entered when you establish a block of mining claim cases: **B52 - LOCATION NOTICE FILED** and **906 - LOCATION DATE**. A money amount is required in the **B52** record.

Mention that some case type/action combinations require structured remarks.

Enter action remarks, if appropriate, and the BLM or other pending entity code for the action.

Discuss the B/C field and demonstrate how to access the Comprehensive page (6) as well as how to remain on the Brief page.

The B/C field on page 5 allows you to move to page 6 and enter more detailed information for the current record. The default in the B/C field is set by your BLM State Office and is dependent on the case type/action code combination. Continue to page 6, if necessary, by entering **C** in the B/C field and pressing NEXT FIELD. Pressing NEXT FIELD with a **B** in the B/C field moves the cursor to the next record on page 5.



STEP 6

Demonstrate and discuss the use of Page 6 to enter comprehensive action data. Review each data element on this page.

Page 6 (Comprehensive action page) allows you to add more detailed action data for the current action on page 5. Although the Comprehensive page is normally optional, some action codes (e.g., money action codes) require you to enter value(s) on it. At the top of page 6, the Current Serial Number's Geographic State and Land Office fields reflect the values entered on page 1, and the action number, date and code of the current action record on page 5 are displayed.

Demonstrate using NEXT/PREVIOUS BLOCK to move between pages 5 and 6 within the current record.

NOTE:

You may use NEXT/PREVIOUS BLOCK at any time (regardless of the letter in the B/C field) to move quickly between pages 5 and 6 within the current record.

Emphasize that cursor movement is determined by case type and action code.

Cursor movement and field access on page 6 are determined by the case type/action code of the current record.

Review the concept of second dates and date types.

Explain and demonstrate using the Second Date Type LOV when only code `70` *appears.*

If accessible and appropriate, enter a second date and second date type code that describe the completion of the action identified by the action code. You may enter a second date type without entering a second date, but not vice versa. Use the List of Values (LOV) available in the Second Date Type field, if necessary. Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of `70`. This code indicates that more than

one second date type is acceptable for this case type/ action code combination. Press NEXT FIELD with the cursor on the 70 to move to a LOV screen listing the acceptable second date type codes.

Emphasize that money amounts are required for money actions and that if the value is a whole number the decimal point and cents do not need to be entered.

For money actions, enter the required money amount for the money received by the BLM in the transaction reflected in this action record.

Emphasize that, if money actions are entered, CASE156F is automatically accessed once data is committed in CASE155F.

NOTE:
If money action(s) are entered for a block of cases on CASE155F, the Generate Accounting Advice Form (CASE156F) is accessed automatically once you COMMIT data for the block of cases on CASE155F.

If appropriate, enter the county courthouse or recording district reception number, book number, page number and/or volume ID assigned to the recorded document identified by the action.

Thoroughly discuss document type/number and their relationship to AALRS data elements. Refer to the AALRS - Interim System Land Status Comparison wall display.

If appropriate, enter the document type code and document number that identify the document being issued with this action. You may enter a document type without entering a document number, but not vice versa.

In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

Emphasize that parcel codes are entered only for land actions in Alaska Native Allotment cases.

If this is an Alaska Native Allotment case, enter the appropriate parcel code for this record, if needed.

Emphasize that the land office and initials entered on the Case Land page control the values displayed and saved for actions records.

The office code and employee initials entered on the Case Land page (page 4) are automatically entered on page 6. Although you may change their values on page 6, your changes are not saved when you press COMMIT. Office code and initials for all case land and action records entered on this form are set by the values entered on page 4.

Demonstrate how to add another action record.

To add another action to the block of cases, press CREATE RECORD on either page 5 or 6. The System automatically generates the next sequential action

number for the block, and the cursor moves to the Action Date field on page 5 for the new action. NEXT RECORD can also be used to create a new record when the cursor is on the last action entered on this form.

Mention how to use DUPLICATE RECORD to save time and effort.

If you are entering an action record with field values similar to those of one already entered on this form, display the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can move around pages 5 and 6, adding, changing and deleting data as needed. This procedure can save you from reentering identical action information over and over again.

Warn students that, if the computer goes down during the entry of a large number of action records, all data entered on this form is lost.

NOTE:

If the computer goes down before you COMMIT data entered on this form, none of your input for the block of cases is saved. Depending on your situation, it may be wise to limit the number of actions entered on this form, and use the Update Action Form (CASE125F) or the Add Action - Brief Form (CASE128F) to enter large numbers of actions.

STEP 7

Once you have filled all mandatory fields on the form with acceptable values for the specified case type, press COMMIT to establish the block of identical cases in the database. You may COMMIT the information from any page in the form (except page 1).

Discuss when it is appropriate to COMMIT. Mention that COMMIT can be pressed on any page once all required fields are filled.

Demonstrate what happens when COMMIT is pressed when no money action has been entered.

If no money action was entered for the block of cases, the cursor returns to page 2. When the block of cases has been established, the beginning and ending case serial numbers for the block of new cases appear in the Serial Number Range fields near the top of the page, and the following message is displayed:

```
Serial Number Range processed. Press any
key to exit.
```

```
Press any function key to acknowledge
message.
```

Pressing any key returns you to a menu.

Demonstrate what happens when COMMIT is pressed when at least one money action has been entered.

If a money action was entered for the block of cases, the cursor temporarily returns to page 2. When the block of cases has been established, the cursor moves directly to the Office Code field on page 1 of the Generate Accounting Advice Form (CASE156F). Also, the beginning and ending case serial numbers for the block of new cases appear in the fields at the top of the page, along with the accounting advice number generated for the block.

!

WARNING:

emphasize that no warning is provided if EXIT is pressed prior to COMMIT.

If you EXIT CASE155F before pressing COMMIT, data entered for the block of new cases are not saved. The System does not ask you if you want to COMMIT your work before exiting.

Review the Quirks subsection point by point and briefly summarize the use of the Establish Block of New Cases form.

Prompt for and answer questions.

Quirks and special data issues for CASE155F:

- CASE156F can only be accessed through CASE155F when money action(s) are entered for a block of new cases. You cannot access the Generate Accounting Advice Form (CASE156F) by using its program name in the QXFER field.
- Some land descriptions for certain case types require specific survey data (e.g., a mining claim MTRS land descriptions requires survey type 5).
- All of the case serial numbers generated with this form are within a sequential range of numbers having the same geographic state and land office/mining claim designation.
- To successfully complete CASE155F, you must enter data organized into five different categories: data for the serial numbers to be generated, case header data, customer link data, case land data, and action data. The five categories of data can be entered on six different pages, but because the comprehensive action page (page 6) is optional, you might not use all six.
- Data entered on pages 2 through 6 of this form are duplicated for each identical case within the block of cases being established.

- Several fields on the Case Header page, Case Land page and Comprehensive Action page are accessible only for certain case types or case type/action code combinations.

- If you need to add a new customer to the customer section of the Interim System database, and you have System privileges to do so, press NEXT FIELD in the Customer ID field on page 3, temporarily suspend work on CASE155F, and move to the Add/ Delete Customer Form (CUST100F).

- Once all of the required fields on a page are filled, you may use NEXT/PREVIOUS BLOCK to quickly move back and forth between completed pages on this form (excluding page 1), adding, changing and deleting data as needed.

- If needed, you may use the Customer page repeatedly to link multiple customers with the block of cases. Similarly, you may use the Case Land page repeatedly to enter multiple case land descriptions for the block.

- Each case land record entered on this form is linked automatically to any `001 - APPLICATION RECEIVED/CASE ESTABLISHED` action records (`B52 - LOCATION NOTICE FILED` action records in Alaska mining claim cases) entered on pages 5 and 6 within each case in the block. For Alaska Native Allotments containing multiple `001` actions, all `001` actions entered on this form are tied to all case lands entered. To avoid confusion, it may be simpler to add case land description(s) for a single parcel on this form, and the one `001` action applying to the parcel.

- There are three special meridian codes of which you should be familiar: `00`, `98` and `99`.

- When you press NEXT FIELD in the Section field, various fields on the form may automatically fill with values pulled from the System's legal land description (LLD) data.

- Depending on the case type and MTRS entered for a land description, the System may skip or require various fields on the Case Land page.

- The cursor automatically skips fields not normally entered for a given survey type. Some survey types may require a survey number, an aliquot part or other data; other survey types may simply warn you if you skip fields normally required for that survey type. You may enter up to four lines of survey information for nested surveys, but most land descriptions use only the first line of Survey fields.

- You can enter a value in the Square Feet field or the Case Land Acres field, but not both. If you enter a square feet value, the System automatically determines and fills in the value of the Case Land Acres field.

- The ANCSA code field is inaccessible on this form. ANCSA codes for a patented or internally conveyed land should be added using the Update Case Land Record Form (CASE125F).

- If the computer goes down before you COMMIT data entered on this form, none of your input for the block of cases is saved. Depending on your situation, it may be wise to limit the number of case land and action records entered on this form.

- Refund money action codes are not accepted on this form. Refunds should be handled on the Accounting Advice Transaction Transfers Form (CASE163F).

- The office code and employee initials entered on the Case Land page (page 4) are automatically entered on page 6. Although you may change their values on page 6, your changes are not saved when you press COMMIT. Office code and initials for all case land and action records entered on this form are set by the values entered on page 4.

- If a money action was entered for the block of cases, the cursor temporarily returns to page 2 when you press COMMIT. When the block of cases has been established, the cursor moves directly to the Office Code field on page 1 of the Generate Accounting Advice Form (CASE156F).

- If you EXIT CASE155F before pressing COMMIT, data entered for the block of new cases are not saved. The System does not ask you if you want to COMMIT your work before exiting.

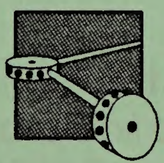
Discuss data required to use CASE156F. Emphasize that most required data is carried over from CASE155F.

Required Data you must have to use the Generate Accounting Advice Form (CASE156F):

- A decision whether or not to print an accounting advice receipt. If you choose to print a receipt, you must specify a destination printer ID.

NOTE:

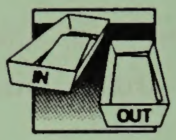
Other than the decision to print a receipt, all required data for CASE156F is automatically carried over from CASE155F after a block of cases Is generated, and all mandatory fields on CASE156F are filled with appropriate data. While there are numerous data elements required on this form, its primary purpose is to allow you to enter optional data (e.g., remitter name and address, accounting advice remarks, etc...), and In some Instances, to overwrite data automatically carried over from CASE155F.



Review the basic structure of CASE156F and the types of data that can be entered and queried.

Structure of the Generate Accounting Advice Form (CASE156F):

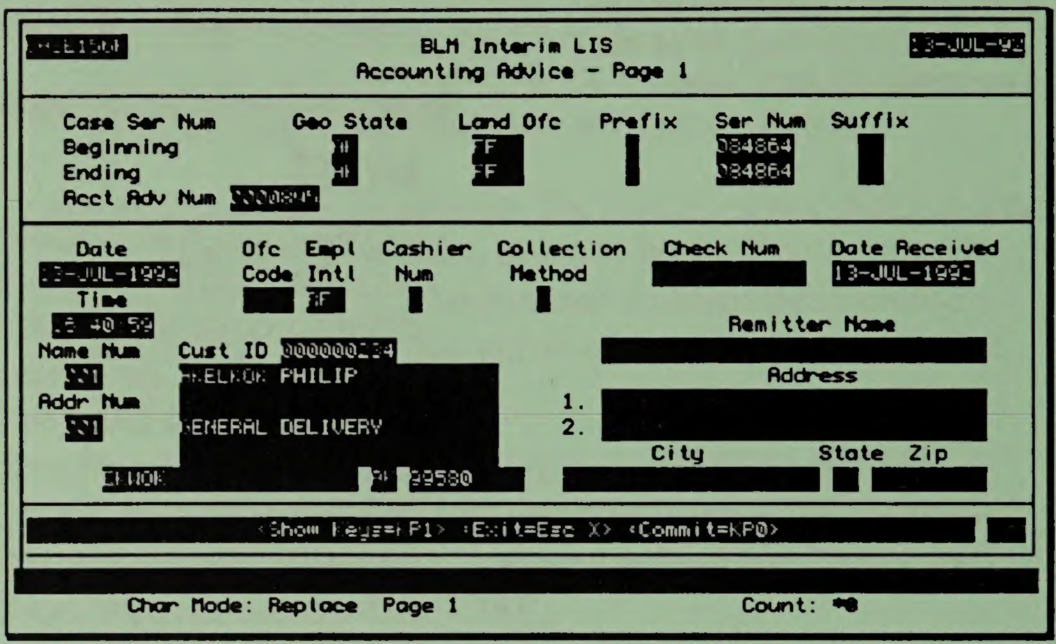
The Generate Accounting Advice Form consists of three pages. Page 1 contains fields listing the beginning and ending serial numbers of the block of cases generated by CASE155, as well as the accounting advice number generated for the block. Page 1 also contains fields that allow you to enter (or alter) the date and time of the accounting advice, office code and initials of the employee authorizing this receipt, cashier number, method and date of payment, and data concerning a customer and payment remitter. Page 2 contains fields that allow you to enter accounting advice remarks. Page 2 also contains fields listing money action data from CASE155F; you may alter the fund code/symbol and money type in each action record listed on page 2. When you commit data entered on pages 1 and 2, fields on page 3 again display the beginning and ending serial numbers of the block of cases and the accounting advice number for the block; fields on page 3 also allow you to specify whether or not you want an accounting advice receipt printed.



Workflow within the Generate Accounting Advice Form (CASE156F) and a review of the form's pages and fields:

Review and demonstrate the step-by-step workflow for the Generate Accounting Advice form.

Use the available training aids as needed.



BLM Interim LIS 13-JUL-92
Accounting Advice - Page 1

Case Ser Num | Geo State | Land Ofc | Prefix | Ser Num | Suffix
Beginning | 084864
Ending | 084864
Acct Adv Num

Date 13-JUL-1992 | Ofc Code | Empl Intl | Cashier Num | Collection Method | Check Num | Date Received 13-JUL-1992
Time
Name Num | Cust ID | Remitter Name
PHILIP
Addr Num | Address
GENERAL DELIVERY | 1. | 2.
99580 | City | State | Zip

<Show Keys=PF1> <Exit=Esc X> <Commit=KP0>

Char Mode: Replace Page 1 Count: *0

STEP 1

NOTE:

Many fields on page 1 of this form (as well as page 2) contain default information provided by the System or carried over from CASE155F.

Demonstrate and discuss the use of Page 1, emphasizing data carried over from CASE155F.

Demonstrate how to enter dates and times different than the defaults.

The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. The value in the Date field is printed at the top of the accounting advice receipt as the date the receipt was created. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).

Mention that employee initials are required in Alaska.

Discuss each of the remaining data elements on this page.

The office code and initials entered on CASE155F appear on this page. Accept these values or enter the appropriate office code and initials of the employee authorizing this accounting advice receipt. An office code is optional, and employee initials are required in Alaska.

Demonstrate and discuss LOV where available.

Enter the optional cashier number that identifies a specific person bonded and authorized to perform cashier functions in the BLM state offices for the

purpose of collecting, receiving and validating monies from the general public into the U.S. Treasury. Use the List of Values (LOV), if necessary.

Enter the optional collection method code that identifies the type of payment used to receive monies from the public. Use the List of Values (LOV), if necessary. If the collection method is by check or money order, the cursor moves to the optional Check Number field so that you may enter a check number.

Emphasize that the Date Received is required.

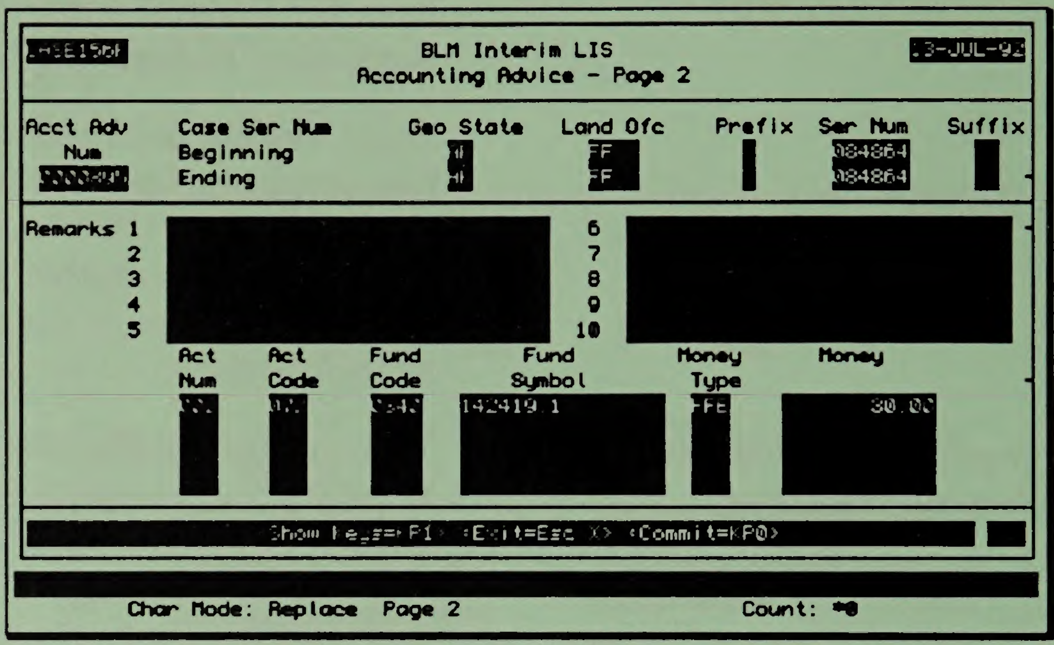
The mandatory Date Received field records the date monies are received by your office, and defaults to today's date. This date prints in the lower right corner of the receipt, next to employee initials. Either accept the default date or change it.

Demonstrate and explain how to change customer data carried over from CASE155F. Emphasize which customer ID's, name numbers and address numbers can be entered.

The required Customer fields are filled with information concerning the first customer for the block of cases established with CASE155F. The cursor skips these fields and moves to the Remitter Name field. Use PREVIOUS FIELD to move back to the Customer fields, as needed. You may overwrite values in the Address Number, Name Number and Customer ID fields; the Name and Address fields are for display only and cannot be accessed. There are no Lists of Values (LOV) available in the Customer fields.

NOTE:
If you change the customer ID automatically placed in the Customer ID field, the new ID must be for a customer entered on CASE155F for the block of cases. If you change the name and address numbers automatically placed on this form, they must exist within the selected customer ID, but do not have to be the numbers associated with the ID in the specified case.

Enter the optional remitter's name, address (use 2 lines, if necessary), city, state and zip code if they are different from the displayed customer data. Use the Lists of Values (LOV) available in the State and Zip Code fields, if necessary.



STEP 2

Discuss and demonstrate the use of Page 2 and review the data elements on the page.

Explain where numbered remarks entered on Page 2 appear on a printed receipt and that each line of remarks can relate to a specific fund code/ symbol on receipts.

Refer to the BLM printed receipt form.

Demonstrate using NEXT BLOCK to skip blank lines and move directly to the Fund Code field.

Mention that the collection method (and check number) as well as the office code and employee initials are printed below the remarks on the receipt.

At the top of page 2 are ten optional 30-character fields for accounting advice remarks related to the fund codes/symbols appearing on the printed receipt or referencing other pertinent information to this accounting advice.

Enter any appropriate accounting advice remarks related to the fund codes and fund symbols in the accounting advice/money actions appearing at the bottom of this page. There is no word wrap from one line of remarks to the next.

To skip any remaining lines of remarks and move directly to the Fund Code field in the first record at the bottom of the page, press NEXT BLOCK on a blank line in the Remarks field.

NOTE:

The first line of remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine the remarks line(s) to use to line up a specific remark with a particular money line on the receipt. Accounting advice remarks print single spaced on the first page of the receipt. The collection method and check number specified on page 1 are printed automatically on the first page of the receipt below the lines of remarks entered on page 2.

STEP 3

The bottom portion of page 2 lists the money action records entered for the block of cases on CASE155F. Each record lists the action number, action code, fund code, fund symbol, money type and money amount carried over from the action pages of CASE155F.

Review and demonstrate how data at the bottom of Page 2 is carried over from CASE155F.

Emphasize which values can and cannot be changed.

NOTE:

The Action Number, Action Code and Money Amount fields in the money actions listed at the bottom of page 2 are inaccessible. You may only enter (or alter) data in the Fund Code, Fund Symbol and Money Type fields of these records. Furthermore, you may not create any new money actions on this form.

Mention that more than four records may be present.

More than the four displayed records may be part of this accounting advice. To scroll to these records, use the appropriate function keys.

Discuss the relationship between fund codes and symbols, emphasizing that the System forces their values to be compatible.

Enter (or replace) the optional fund code, if necessary. Use the List of Values (LOV), if needed. If you enter a fund code or select one from the List of Values, the Fund Symbol field fills with a default value from the validation table corresponding to the entered fund code.

Emphasize that fund codes/ symbols carried over from CASE155F can be changed. Validation is with the Fund Code/Symbol table, not the Case Type/Action Code table.

Enter (or replace) the mandatory fund symbol, if necessary). Use the List of Values (LOV), if needed. If you select a fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table.

Enter (or replace) the optional money type abbreviation for the money involved in this transaction (e.g., filing fee, bid amount, etc...). This code should be related directly to the action in the record. Use the List of Values (LOV), if necessary.

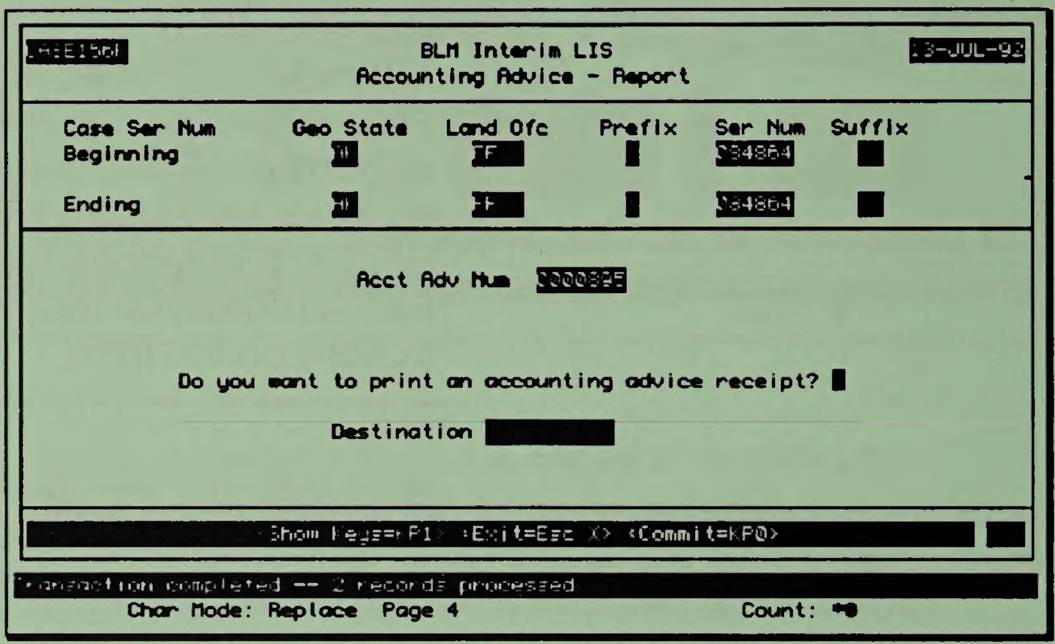
Demonstrate and explain what happens when COMMIT is pressed on Page 2.

Press COMMIT when you have accepted and/or altered fund code, fund symbol and money type values in the money action records listed at the bottom of page 2. The accounting advice information entered on this form is saved in the database and associated with the accounting advice number for the block of cases established with CASE155F. The cursor moves to page 3, and a message regarding the number of records committed appears on the message line.

Emphasize that you must COMMIT on CASE156F before exiting.

NOTE:

You may not EXIT this form until you have pressed COMMIT.



STEP 4

Page 3 displays the beginning and ending case serial numbers for the block of cases established with CASE155F, as well and the accounting advice number associated with the action and accounting advice receipt data entered on both CASE155F and CASE156F.

Discuss how to print a receipt, including the choice of an appropriate printer.

Answer the question, Do You Want To Print An Accounting Advice Receipt? Enter `Y` to print the receipt or `N` to exit the form. If you enter `Y`, you must specify a printer ID. The Destination field contains a default printer ID; accept the default printer, overwrite the displayed ID, or use the List of Values (LOV), if necessary. When you press NEXT FIELD with a valid printer ID in the Destination field, a message similar to the following appears on the message line:

```
RECEIPT request 317 added to queue, 1
records
```

This message indicates that an accounting advice receipt listing data entered on CASE155F and CASE156F is being printed on the specified printer. When you acknowledge the message, you exit this form.

Review the Quirks subsection point by point and briefly review the Generate Accounting Advice form.

Quirks and special data issues for CASE156F:

- This form can be accessed only through the Establish Block of New Cases Form (CASE155F), and only if money action(s) are entered for the block of cases in CASE155F.
- This form is used strictly for generating an accounting advice receipt for a block of newly established cases.
- Other than the decision to print a receipt, all required data for CASE156F is automatically carried over from CASE155F after a block of cases is generated, and all mandatory fields on CASE156F are filled with appropriate data. While there are numerous data elements required on this form, its primary purpose is to allow you to enter optional data (e.g., remitter name and address, accounting advice remarks, etc...), and in some instances, to overwrite data automatically carried over from CASE155F.
- The mandatory Date and Time fields default to the current date and time, and the cursor appears in the Office Code field. If you wish to change the default date and/or time, use PREVIOUS FIELD to access the appropriate field(s) and replace the value(s).
- The cursor skips the Customer fields and moves to the Remitter Name field. Use PREVIOUS FIELD to move back to the Customer fields, overwriting or deleting values, if necessary. There are no Lists of Values (LOV) available in the Customer fields.
- The first line of accounting advice remarks lines up on the printed receipt just above and to the right of the money amount space for the Filing Fee. Use your best judgement to determine which of the ten line(s) to use if you want a specific line of remarks to line up with a particular money line on the printed receipt. Accounting advice remarks print single spaced on the first page of the receipt.
- The Action Number, Action Code and Money Amount fields in the money actions listed at the bottom of page 2 are inaccessible. You may only enter (or alter) data in the Fund Code, Fund Symbol and Money Type fields of these records. Furthermore, you may not create any new money actions on this form.

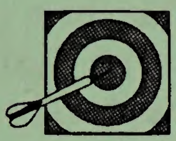
- If you select a fund code or fund symbol from the List of Values, both the Fund Code and Fund Symbol fields fill with the corresponding values from the validation table.
- When you press NEXT FIELD with a valid printer ID in the Destination field, an accounting advice receipt containing the data entered on CASE155F and CASE156F is printed on the specified printer, and a message concerning the print job appears on the message line.

Facilitate a group discussion concerning the use of both CASE155F and CASE156F. Prompt for and answer questions.

Go to Exercise G-1 *(Establish Block of New Case and Generate Accounting Advice).*

Return to and review the Add Block of Previously Serialized Cases form (CASE148F) on pages 20-29 of this training guide..

Add Action Records to a Range of Serial Numbers Form (CASE153F)



45 minutes
(Including Exercise G-2)

Review the purpose of the Add Action Records to a Range of Serial Numbers form, emphasizing the restrictions that exist for adding actions to a range of cases.

Purpose and use of the Add Action Records to a Range of Serial Numbers Form:

This form allows you to add specified action records simultaneously to all the cases within a range of designated case serial numbers in the Interim System database. All of the case serial numbers within the range must have the same geographic state and land office designation, and all cases within the range must be of the same case type.

Some restrictions exist concerning the simultaneous addition of actions to a range of cases. For example, money actions cannot be added on this form. Also, actions entered on this form cannot be dated earlier than any lock action record within the cases in the range.

Review who uses this form and why.

BLM personnel responsible for adding action records simultaneously to a range of serialized cases use this form to perform their task.

Review the differences between CASE153F and CASE145F.

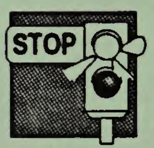
NOTE:
This form (CASE153F) is significantly different from the Update Action - Range of Serial Numbers Form (CASE145F). CASE153F allows you only to add action records specified on the form simultaneously to the cases within the designated range. The action records entered on CASE153F are added, across the board, to all cases within the range. CASE145F allows you to cycle through the cases within a designated range one at a time, allowing you to add, change or delete action records within individual cases. Updates within one serialized case in CASE145F have no effect on any other case within the range.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE153F program name in QXFER:

The Add Action Records to a Range of Serial Numbers Form (CASE153F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Re-

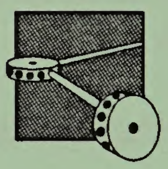
stricted Case Processing Menu option from the Interim System Main Menu and then the Add Actions to Range of Serial Numbers option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE153F program name.



Discuss data required to use this form and the minimum data required to add an action to a range of cases.

Required Data you must have to use this form:

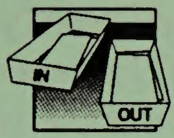
- A sequential range of Case Serial Numbers having the same geographic state and land office/mining claim designation.
- Case Type code of all cases within the specified range.
- Action Codes and Action Dates (as well as any other action data required for a case type/action code combination) for the action records to be added to the specified range.
- Employee Initials (Alaska only).



Review this form's basic structure and the types of data that can be entered.

Structure of form:

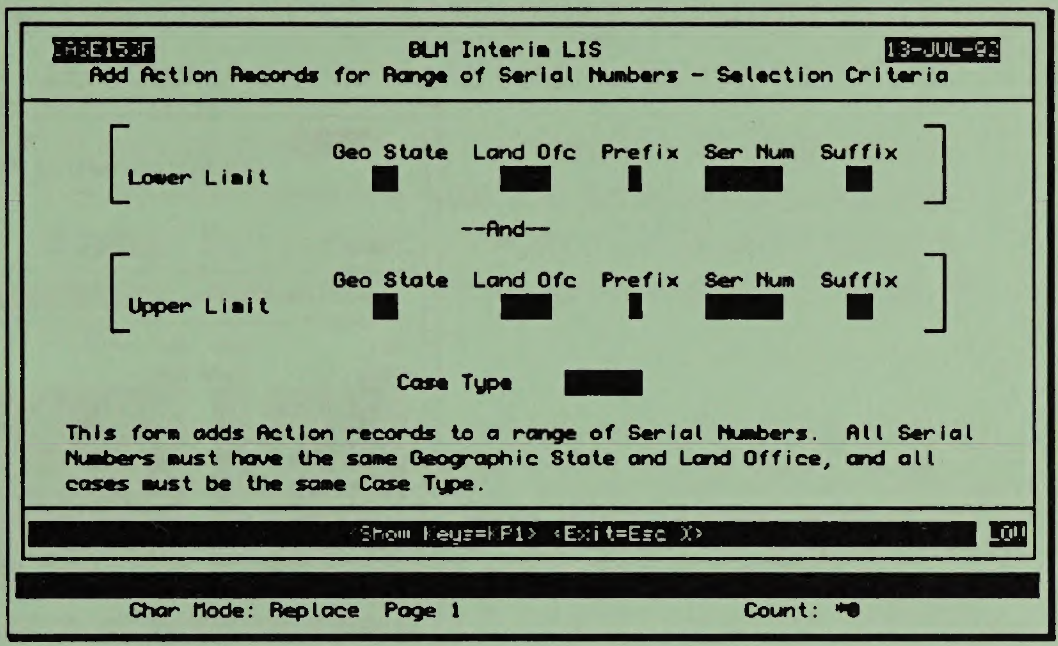
Page 1 allows you to enter the lower and upper limit of the sequential serial number range and the uniform case type of all cases in the range. Pages 2 and 3 (Brief and Comprehensive action pages) contain fields specifically related to the actions to be added to the range. The Brief page allows you to add basic action record data (e.g., action date and code, action remarks, employee initials and office code, etc...). The Comprehensive page allows you to specify more detailed action data (e.g., second date information, document data, parcel code, etc...). The structure and functionality of this form's brief and comprehensive pages are virtually identical to the Brief and Comprehensive pages of the Update Action Form (CASE127F).



Workflow within this form and a review of the form's pages and fields:

Review the step-by-step workflow for the Add Action Records to a Range of Serial Numbers form.

Use the available training aids as needed.



STEP 1

Enter the lower and upper limits of the sequential range of cases in the two groups of Case Serial Number fields on page 1. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary. Values in the inaccessible Geographic State and Land Office fields for the upper limit automatically default to the those entered for the lower limit.

Demonstrate the use of LOV where available.

Mention that the Geographic State and Office Code fields of the upper limit default to those entered for the lower limit.

NOTE:

The specified range must contain at least one valid, unvoided serial number. Invalid and voided serial numbers can fall within the range, and are also accepted as the range's lower and upper limits. Actions added on this form are not added to invalid or voided cases.

Explain that the range must contain at least one valid case and that invalid and voided numbers can be entered as limits.

Explain that actions are not added to invalid and voided cases.

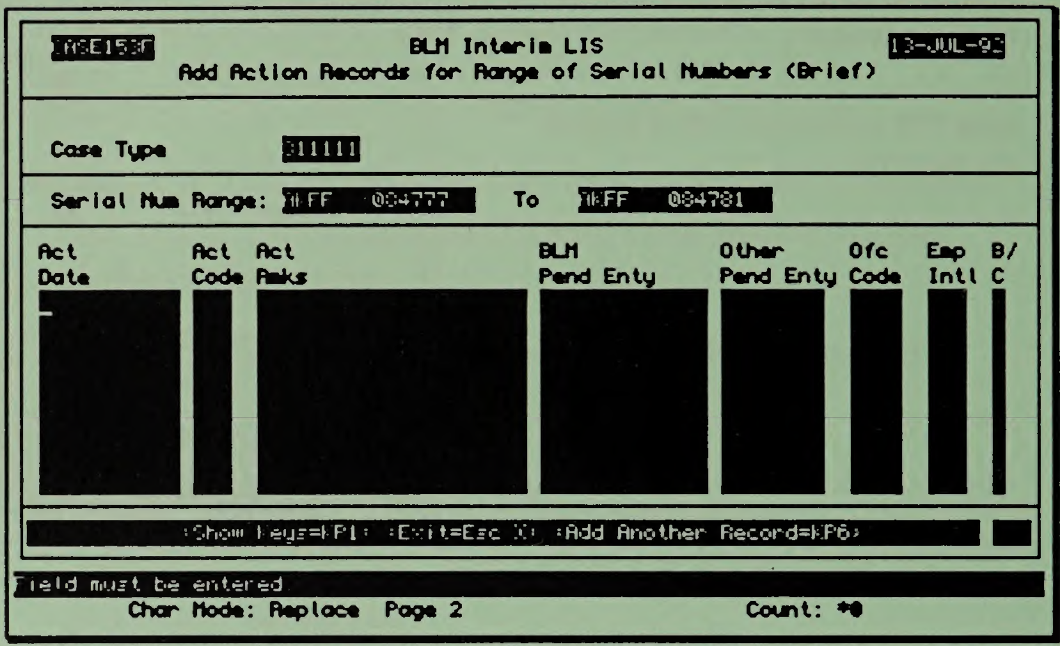
All cases within the range must have the same case type. This is because many action codes are case type sensitive, and mixing case types within a range could lead you to add invalid action codes to some cases.

Emphasize that all cases within the range must have the same case type.

Enter the appropriate case type. If all cases in the range are not of the specified case type, an error message appears and the cursor returns to the Geographic State field of the lower limit.

Demonstrate and discuss what happens when Page 2 is accessed.

Press NEXT FIELD in the Case Type field to move to page 2 (Brief action page). The specified case type and the lower and upper limits of the range of cases are displayed at the top of page 2.



STEP 2

Thoroughly discuss how to enter brief action data on Page 2 and review each of the data elements.

Page 2 allows you to enter brief action data for one or more action records to be added to all cases within the specified case range. Each record is displayed on a separate line on page 2, and for each action record entered on this page, you have the option of entering more detailed action data on page 3 (the Comprehensive page).

Mention that action numbers do not appear on this form since each case's numbers may be different for the actions added using this form.

NOTE:
Action numbers do not appear on this form. Actions entered on this form are added to multiple cases, each having its own sequence of action numbers. Appropriate action numbers are generated for each case in the range only after COMMIT is pressed and as the actions entered on this form are added.

Remind students that action codes are case type sensitive and that action dates cannot be earlier than a lock action date in any of the cases in the range.

Enter the required action date and code for the record. Remember that case type determines valid actions, and that actions cannot be dated earlier than a lock action date, if present in any of the cases in the range. Use the List of Values (LOV) available in the Action Code field, if necessary. The action code LOV indicates

Review the information found on the Action Code LOV.

if action codes are money actions, effect case status, allow second date types (and, if so, which ones), require pending entities, etc....

Emphasize that money actions cannot be entered on this form and that certain duplicate actions are not accepted for some case types.

NOTE:

Money actions cannot be added to a range of cases with this form. Use the Accounting Advice - Block of Serial Numbers Form (CASE143F) to add actions containing money amounts to a range of case.

For some case types, certain action codes cannot exist in a case more than once (e.g., B52 in mining claim cases). An error occurs if you attempt to add a duplicate code under these conditions.

Mention that some case type/ action combinations require structured remarks.

Enter action remarks, if appropriate, and the BLM or other pending entity code for the action.

Emphasize that employee initials are required in Alaska.

Enter your office code and initials or the office code and initials of the employee who made the decisions regarding this action record.

The initials of the employee authorizing a new action are required in Alaska.

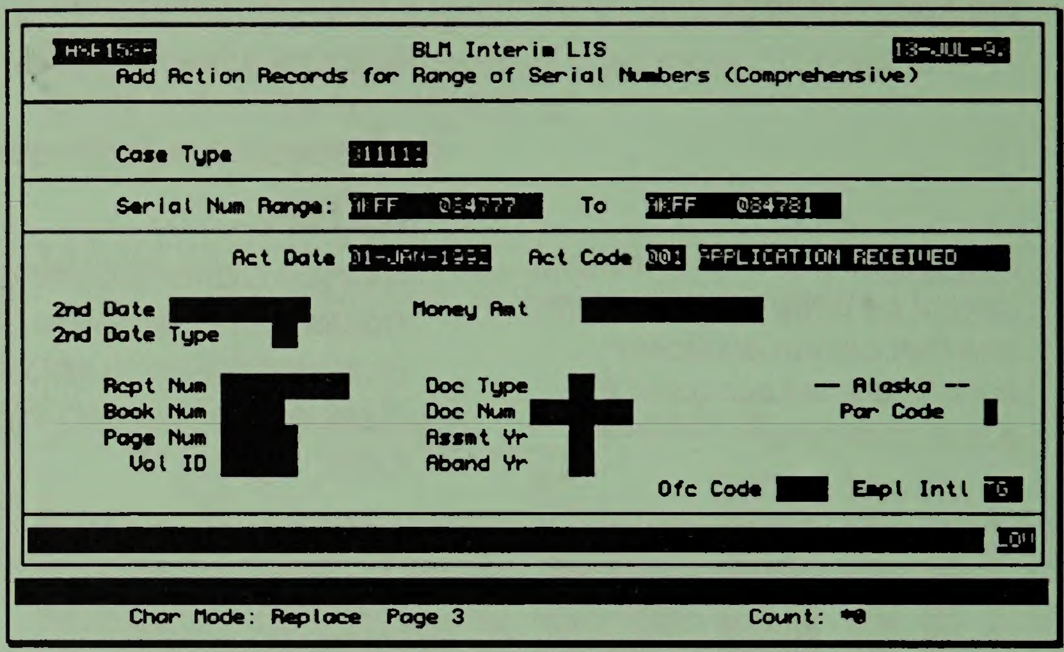
Discuss the B/C field and demonstrate how to access the Comprehensive page (Page 3) as well as how to remain on the Brief page.

The B/C field on page 2 allows you to move to the Comprehensive page (page 3) and enter detailed action data for the record. Your BLM State Office determines the default value appearing in the B/C field for each case type/action code combination. Move to page 3, if appropriate, by entering **C** in the B/C field and pressing NEXT FIELD. Pressing NEXT FIELD with a **B** in the B/C field moves the cursor to the next record on page 2.

Demonstrate NEXT/PREVIOUS BLOCK to move between pages 2 and 3.

NOTE:

For each action record entered on this form, you may use NEXT/PREVIOUS BLOCK (once all required data on page 2 are entered) to move quickly between pages 2 and 3 within the current record. Regardless of the letter in the B/C field, NEXT BLOCK moves you from page 2 to page 3 just as if **C** was entered in the B/C field.



STEP 3

Review and discuss each of the data elements on Page 3, emphasizing which are not accessible and which are accessible for only certain case types.

Review the concept of second dates and date types.

Explain and demonstrate using the Second Date Type LOV when only code `70` *appears.*

At the top of page 3, display-only fields list the case type and the lower and upper limits of the range of cases entered on page 1, as well as the action date and code entered on page 2 for the current action.

Cursor movement and field access on page 3 are determined by the case type and action code of the current record. The Money Amount field is not accessible on this form, and always remains blank.

If accessible and appropriate, enter a second date and second date type code that describe the completion of the action identified by the action code. You may enter a second date type without entering a second date, but not vice versa. Use the List of Values (LOV) available in the Second Date Type field, if necessary. Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of `70`. This code indicates that more than one second date type is acceptable for this case type/action code combination. Press NEXT FIELD with the cursor on the `70` to move to a LOV screen listing the acceptable second date type codes.

If appropriate, enter the county courthouse or recording district reception number, book number, page number and/or volume ID assigned to the recorded document identified by the action.

Thoroughly discuss document type/numbers and their relationship to AALRS data elements. Refer to the AALRS - Interim System Land Status Comparison wall display.

If appropriate, enter the document type code and document number that identify the document being issued with this action. You may enter a document type without entering a document number, but not vice versa.

In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

Emphasize that assessment and abandonment year data are entered only for specific actions in mining claim cases.

If the cases within the specified range have a mining claim case type, and if appropriate for the current action, enter assessment year and/or abandonment year data.

Emphasize that parcel codes are entered only for land actions in Alaska Native Allotment cases.

If the cases within the specified range are Alaska Native Allotment cases, enter the appropriate parcel code for this record, if appropriate.

Warn students not to fill in the Office Code on page 3 – office codes should be entered on Page 2.

NOTE:
The Office Code and Employee Initials fields on page 3 display the values entered on page 2, and the Employee Initials field is inaccessible. Although the Office Code field is the last accessed field on page 3, do not enter or change its value. An office code for the current record should only be entered on page 2.

Demonstrate returning to the current record on Page 2.

To return to the current record on page 2, press NEXT FIELD in the Office Code field or PREVIOUS BLOCK in any field on page 3.

Demonstrate how to enter another action record and how to scroll through actions.

To enter another action on the form, press CREATE RECORD or NEXT RECORD in any field on pages 2 or 3. A blank record is added, and the cursor moves to the Action Date field on page 2 in the new record. Use NEXT/PREVIOUS RECORD to scroll through the list of actions entered on this form.

Review how to use CREATE RECORD and DUPLICATE RECORD to save reentering values over and over and over and over and over again.

If you are entering an additional action with field values similar to those of an action already entered on this form, move to the existing record, and press CREATE RECORD and DUPLICATE RECORD. A new, duplicate record is generated, and you can add,

change and delete data as needed. This procedure can save you from having to reenter identical action information over and over again.

STEP 4

Demonstrate and discuss what happens when COMMIT is pressed.

Press COMMIT once you have entered the action records you want added to all the cases within the range of cases. The action records you have entered on the form are added to each case within the specified range of serial numbers, the cursor returns to the lower limit Case Serial Number fields on page 1, and the following message is displayed:

```
Action Records have been inserted into
Serial Number Range.
```

Warn students that, if EXIT is pressed prior to COMMIT, the actions entered on the form cannot be added to the cases in the range.

WARNING:

If you press EXIT before pressing COMMIT, the action records entered on this form will not be added to the cases in the specified range.

Review the Quirks subsection point by point and briefly summarize the use of this form.

Quirks and special data issues for CASE153F:

- This form (CASE153F) is significantly different from the Update Action - Range of Serial Numbers Form (CASE145F). CASE153F allows you only to add action records specified on the form simultaneously to the cases within the designated range. The action records entered on CASE153F are added, across the board, to all cases within the range. CASE145F allows you to cycle through the cases within a designated range one at a time, allowing you to add, change or delete action records within individual cases. Updates within one serialized case in CASE145F have no effect on any other case within the range.
- All of the case serial numbers within the specified range must have the same geographic state and land office designation. The range must contain at least one valid, unvoided serial number. Invalid and voided serial numbers can fall within the range, and are also accepted as the range's lower and upper limits. Actions added on this form are not added to invalid or voided cases.

- All cases within the range must be of the same case type. This is because many action codes are case type sensitive, and mixing case types within a range could lead you to add invalid action codes to some cases.

- Action numbers do not appear on this form. Actions entered on this form are added to multiple cases, each having its own sequence of action numbers. Appropriate action numbers are generated for each case in the range only after COMMIT is pressed and as the actions entered on this form are added.

- Money actions cannot be added to a range of cases with this form. Use the Accounting Advice - Block of Serial Numbers Form (CASE143F) to add actions containing money amounts to a range of case.

- For some case types, certain action codes cannot exist in a case more than once (e.g., B52 in mining claim cases). An error occurs if you attempt to add a duplicate code under these conditions.

- The B/C field on page 2 allows you to move to the Comprehensive page (page 3) and enter detailed action data for the record. Your BLM State Office determines the default value appearing in the B/C field for each case type/action code combination.

- For each action record entered on this form, you may use NEXT/PREVIOUS BLOCK (once all required data on page 2 are entered) to move quickly between pages 2 and 3 within the current record.

- Cursor movement and field access on page 3 are determined by the case type and action code of the current record. The Money Amount field is not accessible on this form, and always remains blank.

- Certain case type/action code combinations displayed on the Second Date Type LOV screen list only a second date type code of **70**. This code indicates that all second date type codes are acceptable for this case type/action code combination.

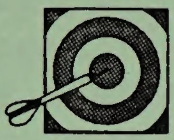
- In the Interim System, the combination of the two-character Document Type field and the eight-character Document Number field are comparable to the ten-character Conveyance Prefix/Disposition Number in AALRS.

- The Office Code and Employee Initials fields on page 3 display the values entered on page 2, and the Employee Initials field is inaccessible. Although the Office Code field is the last accessed field on page 3, do not enter or change its value. An office code for the current record should only be entered on page 2.
- If you press EXIT before pressing COMMIT, the action records entered on this form will not be added to the cases in the specified range.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise G-2 *(Add Block of Previously Serialized Cases and Add Action Records to a Range of Serial Numbers forms).*

Add General Remarks to a Range of Serial Numbers Form (CASE154F)



15 minutes

Review the purpose of the Add General Remarks to a Range of Serial Numbers form.

Purpose and use of the Add General Remarks to a Range of Serial Numbers Form:

This form allows you to add general remarks simultaneously to a consecutive range of previously established cases in the Interim System. All of the case serial numbers within the range must have the same geographic state and land office designation.

Emphasize that this form appends general remarks to existing remarks for the cases specified.

NOTE:
You cannot insert general remarks into the middle of existing remarks in the specified cases; the System simply appends remarks entered on this form to any existing remarks in the cases.

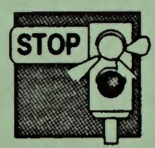
Review who uses this form and why.

BLM personnel responsible for adding general remarks simultaneously to a consecutive range of serialized cases use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE154F program name in QXFER:

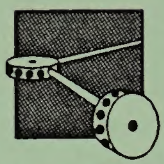
The Add General Remarks to a Range of Serial Numbers Form (CASE154F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu and then the Add Gen Rmks to Range of Serial Numbers option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE154F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

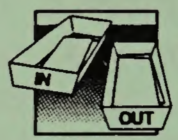
- A consecutive range of Case Serial Numbers (having the same geographic state and land office/mining claim designation).
- One or more general remark(s) to be added to the specified range of cases.



Review this form's basic structure and the types of data that can be entered.

Structure of form:

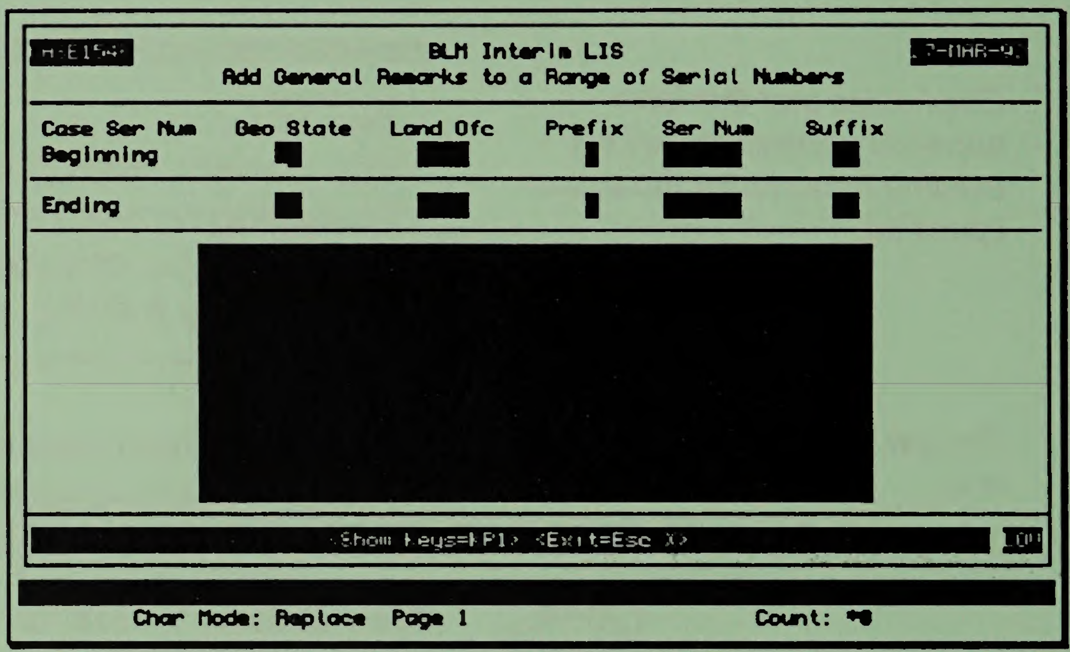
The Add General Remarks to a Range of Serial Numbers Form consists of a single page containing fields for entering the beginning and ending serial numbers of the sequential range, and the general remarks to be added to the range of case serial numbers.



Review the step-by-step workflow for the Add General Remarks to a Range of Serial Numbers form.

Use the available training aids as needed.

Workflow within this form and a review of the form's fields:



STEP 1

Demonstrate the use of LOV where available.

Emphasize that all serial numbers within the range must have the same geographic state and land office designation and that the Geo State and Land Office fields of the ending serial number are filled automatically.

The block at the top of this form contains fields for entering the case serial numbers that specify the beginning and end of the sequential range to which you want general remarks added. Enter the case serial number at the beginning of the range in the top group of serial number fields. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

All of the serial numbers within the consecutive range must have the same geographic state and land office designation. Because of this, the geographic state and land office values entered in the Beginning group of fields automatically appear in the corresponding fields of the case serial number specifying the end of the range, and the ending serial number's Prefix is the first enterable field in this group.

Mention that the ending serial number must be greater than or equal to the beginning serial number. Also mention that serial numbers of voided cases are not accepted and no remarks are added to invalid or voided cases within a range.

Enter the prefix, serial number and suffix, as appropriate, of the ending case serial number. The ending serial number must be greater than or equal to the beginning serial number.

NOTE:
This form does not accept invalid serial numbers or the serial numbers of voided cases. Serial numbers of closed cases are accepted. If voided or invalid serial numbers fall within the specified range, the System automatically skips them; general remarks entered on this form are not added to voided or invalid serial numbers within the range.

STEP 2

Demonstrate and discuss entering general remarks records on this form.

You may enter multiple general remarks in the General Remarks field, and each line of remarks is a separate general remarks record. Enter the lines of general remarks to be added to all the cases within the range in the General Remarks field. There is no wrap-around feature from line to line; when you reach the end of a line, you must press NEXT FIELD, NEXT RECORD or CREATE RECORD to move to the next line.

There is no limit to the number of lines you can enter in the General Remarks field. As many lines as you need can be added to the bottom of the list or inserted where appropriate. If you add more than ten lines of remarks, the lines displayed at the top of the field scroll off the screen to accommodate the additional records added at the bottom.

Use the appropriate function keys to scroll through the records you have entered, create or insert more records, and change or delete lines of remarks already entered.

Mention that all remarks remain in the order displayed on the form.

NOTE:
All remarks remain in the order displayed on the form. If you insert a line, all subsequent lines are moved down.

STEP 3 After you have entered the general remarks you want to add to all the cases within the serial number range, press COMMIT. The general remarks records you have entered on the form are added to each case within the specified range of serial numbers, and the following message is displayed:

`Transaction completed - X records processed`

Press EXIT to return to the menu from which you accessed this form, or press CLEAR FORM if you want to clear the form's fields and enter a new range of case serial numbers.

!

WARNING:

Explain what happens after COMMIT is pressed and emphasize that users should normally press CLEAR FORM or EXIT.

Warn students that they should not update or delete previously committed general remarks entered on this form.

After you press COMMIT, the cursor remains in the General Remarks field on the last entered general remarks record. Normally, you should press either EXIT to return to a menu or CLEAR FORM to clear all of the form's fields and return the cursor to the Beginning Case Serial Number fields.

You may, however, continue to add new general remarks records to those already committed and displayed on the form, and you may clear previously committed records from the screen using CLEAR RECORD. Press COMMIT to append any newly added remarks to the range of cases. Although the form allows you to move back to previously committed records and apparently change or delete them, the System will not accept these updates; if you change or delete a previously committed record and press COMMIT, the System displays an error message. Use the Update General Remarks Form (CASE103F) to change and delete previously committed general remarks.

Review the Quirks subsection point by point and briefly summarize the use of this form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Quirks and special data issues for CASE154F:

- The System simply appends remarks entered on this form to any existing remarks in the cases within the specified range. You cannot insert general remarks into the middle of existing remarks in the specified cases.

- All of the case serial numbers within the specified range must have the same geographic state and land office designation.

- Case serial numbers of closed cases may be entered as the beginning and/or end of the specified range, but voided and invalid serial numbers cannot be entered.

- If voided or invalid cases fall within the specified range, they are automatically skipped, and general remarks are not added to them.

- All remarks remain in the order displayed on the form. If you insert a line, all subsequent lines are moved down.

- After you press COMMIT, the cursor remains in the General Remarks field on the last entered general remarks record. Normally, you press EXIT or CLEAR FORM. You may, however, continue to add new lines of remarks to those already committed and displayed on the form, and you may clear previously committed records from the screen using CLEAR RECORD. Press COMMIT to append any newly added remarks to the range of cases. Although the form allows you to move back to previously committed records and apparently change or delete them, the System will not accept these updates; if you change or delete a previously committed record and press COMMIT, the System displays an error message. Use the Update General Remarks Form (CASE103F) to change and delete previously committed general remarks.

Add General Remarks to Random Serial Numbers Form (CASE161F)

25 minutes
(Including Exercise G-3)

Review the purpose of the Add General Remarks to Random of Serial Numbers form.

Purpose and use of the Add General Remarks to Random Serial Numbers Form:

This form allows you to add general remarks simultaneously to up to 14 random cases in the Interim System.

NOTE:
You cannot insert general remarks into the middle of existing remarks in the specified random cases; the System simply appends remarks entered on this form to any existing remarks in the cases.

Review who uses this form and why.

BLM personnel responsible for adding general remarks simultaneously to multiple random serialized cases use this form to perform their task.

Review navigation to this form (including QXFER).

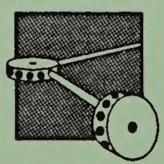
Navigation to this form and use of CASE161F program name in QXFER:

The Add General Remarks to Random Serial Numbers Form (CASE161F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu and then the Add Gen Rmks to Random Serial Numbers option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE161F program name.

Discuss data required to use this form.

Required Data you must have to use this form:

- One or more random Case Serial Numbers.
- One or more general remark(s) to be added to the specified random cases.

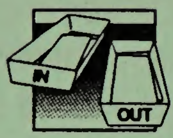


Review this form's basic structure and the types of data that can be entered.

Structure of form:

The Add General Remarks to Random Serial Numbers Form consists of two pages. Page 1 contains fields for entering up to 14 random case serial numbers. Page 2

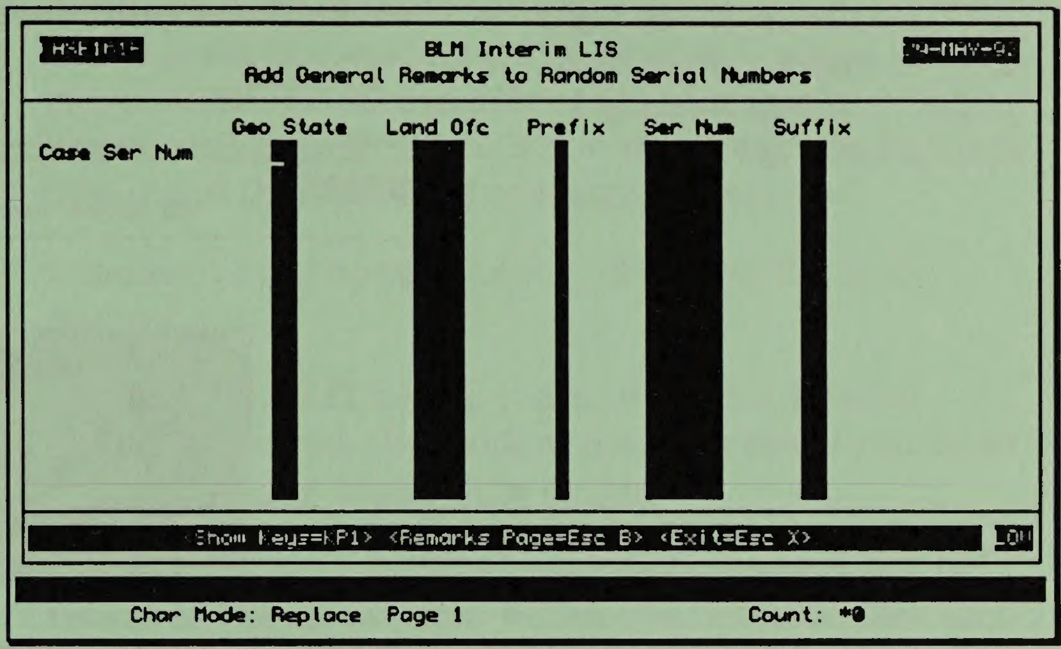
contains the General Remarks field for entering the remarks to be added to the random serial numbers specified on page 1.



Workflow within this form and a review of the form's pages and fields:

Review the step-by-step workflow for the Add General Remarks to Random Serial Numbers form.

Use the available training aids as needed.



STEP 1

Page 1 of this form contains fields for entering up to 14 random serial numbers for the cases to which you want general remarks added. Enter the random case serial number(s) in the appropriate fields. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Emphasize that up to 14 serial numbers can be specified.

Demonstrate the use of LOV where available.

Mention that serial numbers of voided cases are not accepted.

NOTE:

This form does not accept invalid serial numbers or the serial numbers of voided cases. Serial numbers of closed cases are accepted.

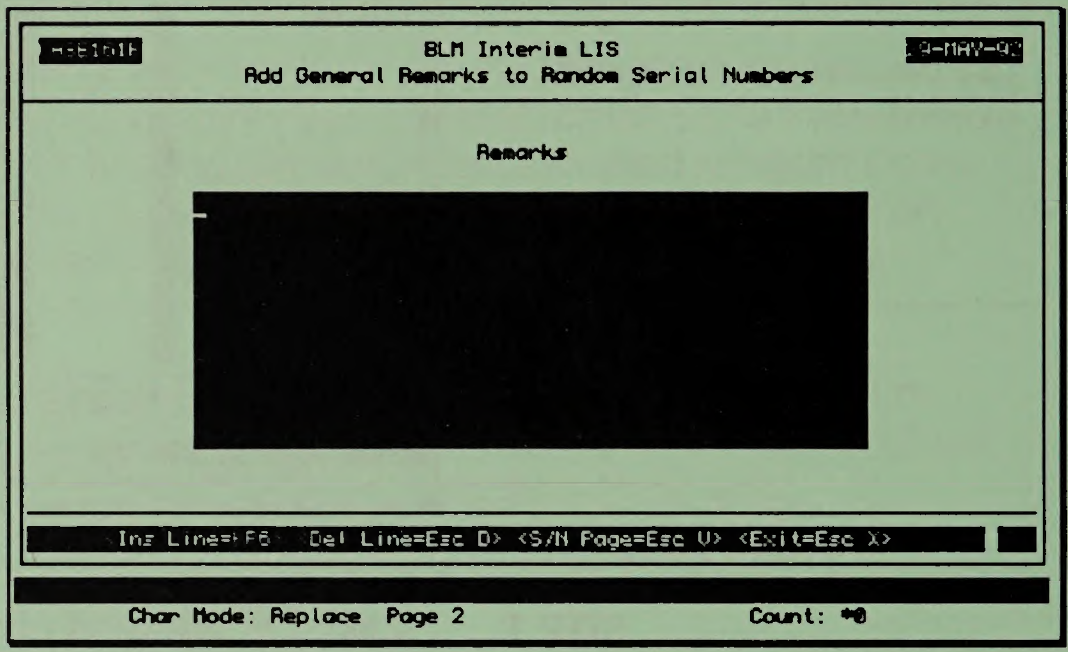
Demonstrate using NEXT BLOCK to move to Page 2.

Press NEXT BLOCK in either the Serial Number or Suffix field of any case serial number entered, and move to page 2.

Warn students that when *PREVIOUS BLOCK is pressed on Page 2 before remarks are entered, the form clears completely (including the serial numbers on Page 1).*

WARNING:

If you press PREVIOUS BLOCK on page 2 without having entered any general remarks, the cursor returns to the top of page 1 and clears all previously entered case serial numbers.



STEP 2

Demonstrate and discuss entering general remarks on Page 2.

Page 2 of this form contains the General Remarks field. You may enter multiple general remarks in this field, and each line of remarks is a separate general remarks record. Enter the lines of remarks to be added to each of the random cases specified on page 1. There is no wrap-around feature from line to line; when you reach the end of a line, you must press NEXT FIELD, NEXT RECORD or CREATE RECORD to move to the next line.

There is no limit to the number of lines you can enter in the General Remarks field. As many lines as you need can be added to the bottom of the list or inserted where appropriate. If you add more than ten lines of remarks, the lines displayed at the top of the field scroll off the screen to accommodate the additional records added at the bottom.

Use the appropriate function keys to scroll through the records you have entered, create or insert more records, and change or delete lines of remarks already entered.

Mention that all remarks remain in the order displayed on the form.

NOTE:

All remarks remain in the order displayed on the form. If you insert a line, all subsequent lines are moved down.

STEP 3

After you have entered the general remarks you want added to all the random cases specified on page 1, press COMMIT. The general remarks records you have entered on the form are added to the appropriate cases, and the following message is displayed:

```
Transaction completed - X records pro-
cessed
```

If you press EXIT before committing the general remarks entered, the System does not ask if you want to commit your data before exiting.

Once you have committed your data, press EXIT to return to the menu from which you accessed this form. If you want to clear the form's fields and enter a new range of case serial numbers, press CLEAR FORM or PREVIOUS BLOCK.

!

Explain what happens after COMMIT is pressed and emphasize that users should normally press CLEAR FORM or EXIT.

Warn students that they may not update or delete previously committed remarks entered on this form.

WARNING:

After you press COMMIT, the cursor remains on page 2 in the General Remarks field on the last entered general remarks record. Normally, you should press EXIT to return to a menu or CLEAR FORM or PREVIOUS FIELD to clear all of the form's fields and return the cursor to the Case Serial Number fields on page 1.

You may, however, continue to add new general remarks records to those already committed and displayed on page 2, and you may clear previously committed records from the screen using CLEAR RECORD. Press COMMIT to append any newly added remarks to the specified random cases. Although the form allows you to move back to previously committed records, you may not edit or delete them. Use the Update General Remarks Form (CASE103F) to change and delete previously committed general remarks.

Review the Quirks subsection point by point and briefly summarize the use of this form.

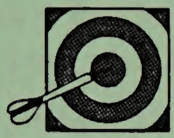
Quirks and special data issues for CASE161F:

- The System simply appends remarks entered on this form to any existing remarks in the specified random cases. You cannot insert general remarks into the middle of existing remarks in the specified cases.
- This form allows you to enter up to 14 random serial numbers for the cases to which you want general remarks added.
- Case serial numbers of closed cases may be entered on this form, but voided and invalid serial numbers cannot be entered.
- If you press PREVIOUS BLOCK on page 2 without having entered any general remarks, the cursor returns to the top of page 1 and clears all previously entered case serial numbers.
- All remarks remain in the order displayed on the form. If you insert a line, all subsequent lines are moved down.
- If you press EXIT before committing the general remarks entered, the System does not ask if you want to commit your data before exiting.
- After you press COMMIT, the cursor remains on page 2 in the General Remarks field on the last entered general remarks record. Normally, you press EXIT, CLEAR FORM or PREVIOUS FIELD. You may, however, continue to add new general remarks records to those already committed and displayed on page 2, and you may clear previously committed records from the screen using CLEAR RECORD. Press COMMIT to append any newly added remarks to the specified random cases. Although the form allows you to move back to previously committed records, you may not edit or delete them. Use the Update General Remarks Form (CASE103F) to change and delete previously committed general remarks.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

***Go to Exercise G-3** (Add General Remarks to a Range of Serial Numbers and to Random Serial Numbers).*

Void Case Form (CASE130F)



10 minutes

Review the purpose of the Void Case form, emphasizing what happens to case data when a case is voided.

Purpose and use of Void Case Form:

The Void Case Form (CASE130F) allows you to enter a case serial number, view existing case header data, and delete most of the data associated with the case.

When you void a case, the case status changes automatically to `01 - VOID`, and most case data is deleted from the System. The only data remaining in a voided case are the case serial number, minimal case header data (including case type, case status, and claim name for mining claims), and if present, the `997 - SERIALIZED IN ERROR` action record.

Remind students to add a `SERIALIZED IN ERROR` *action to a case before voiding it.*

NOTE:
Action records cannot be added to voided cases. If a **SERIALIZED IN ERROR** action record needs to be added to a case that is being voided, add this action record before using this form to void the case.

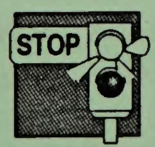
Review who uses this form and why.

BLM personnel responsible for voiding cases in the Interim System use this form to perform their tasks.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE130F program name in QXFER:

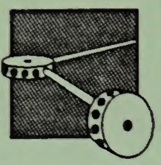
The Void Case Form (CASE130F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu, then the Void Case option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE130F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

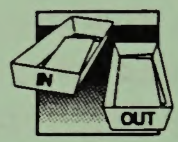
- A valid Case Serial Number associated with case data.



Review this form's basic structure and the types of data that can be entered, retrieved and deleted.

Structure of the form:

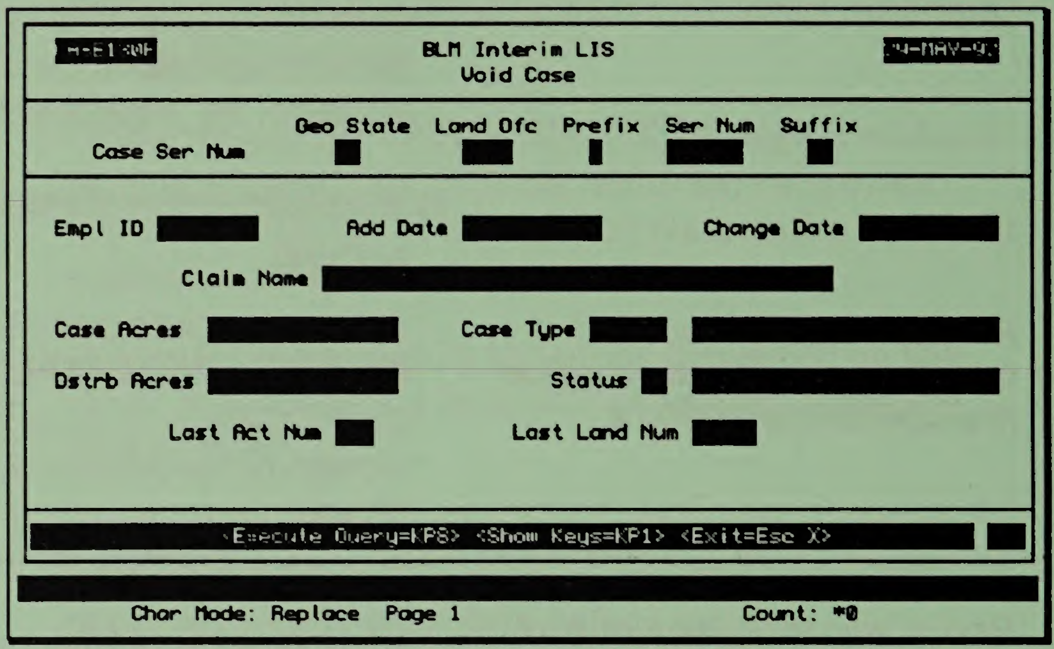
The Void Case Form consists of a single page containing Case Serial Number fields for the case to be voided, as well as fields displaying case header information so that you can verify you are voiding the correct case.



Workflow within this form and a review of the form's fields:

Review the step-by-step workflow for the Void Case form.

Use the available training aids as needed.



STEP 1

Enter the serial number of the case to be voided. Lists of Values (LOV) are not available in any of the Case Serial Number fields. This form will not accept invalid case serial numbers or the serial numbers of previously voided cases.

Demonstrate the use of LOV where available.

Press EXECUTE QUERY to retrieve case header information for the specified case. Case header information appears in the fields below the serial number and includes: Employee Identification, Add Date, Change Date, Claim Name, Case Acres, Case Type, Disturbed Acres, Case Status, Last Action Number and Last Land Number. You cannot access these fields; this information is displayed for verification purposes before you void the case.

Mention that EXECUTE QUERY must be pressed to retrieve case header data and that no case header field can be accessed.

If action or land records in the specified case are locked, a warning error message appears, but you may continue with the procedure to void the case.

Mention that if records in the case are locked a warning message is displayed, but the case can still be voided.

Mention that you cannot void an invalid serial number or a case that has already been voided.

If you execute a query for an invalid serial number, no data is retrieved, and the cursor moves to the blank Change Date field; press CLEAR FORM to return to the Case Serial Number fields. If you execute a query for the serial number of a voided case, no data is retrieved, and an error message is displayed on the message line; acknowledge the message to return to the Case Serial Number fields.

WARNING:

Before moving to the next step, check the displayed information to verify that you are voiding the correct case.

Explain what happens when a case serial number is entered after case header data for another case is displayed on the form (but before the case has been voided).

If you enter a new case serial number before you void a case for which case information has been retrieved, the following message is displayed:

`Do you want to commit the changes you have make? Y`

Although the default for this question is **`Y`**, it does not matter whether you enter a **`Y`** or **`N`** because the System retrieves and displays case header information for the newly entered case serial number.

STEP 2

Once case header data is displayed for a case, the following message appears on the message line:

`Must hit Commit key to void case`

Emphasize that COMMIT must be pressed to void a case.

Press COMMIT to void this case. Press EXIT or CLEAR FORM if you do not wish to void the case. When you press COMMIT, the fields on the form briefly display automatically changed header data, and then clear. The following message appears on the message line:

`Case has been voided`

Review what happens to a case's data when the case is voided.

NOTE:

Once you press COMMIT, the case is voided in the System, and case status changes to `01 - VOID`. Only the case serial number, minimal case header data (including case type, case status, and claim name for mining claims), and if present, the `997 - SERIALIZED IN ERROR` action record are retained in the database.

Review the Quirks subsection point by point and briefly summarize the use of the Void Case Form.

Quirks and special data issues for CASE130F:

- When you void a case, the case status changes automatically to `01 - VOID`, and most case data is deleted from the System. The only data remaining in a voided case are the case serial number, minimal case header data (including case type, case status, and claim name for mining claims), and if present, the `997 - SERIALIZED IN ERROR` action record. Since action records cannot be added to voided cases, add the **SERIALIZED IN ERROR** action record to a case, if needed, before using this form to void the case.

- Lists of Values (LOV) are not available in any of the Case Serial Number fields.

- This form will not accept invalid case serial numbers or the serial numbers of previously voided cases.

- Instead of pressing NEXT FIELD in the case serial number Suffix field to retrieve case header information from the database, you must press EXECUTE QUERY to make this retrieval.

- If you execute a query for an invalid serial number, no data is retrieved, and the cursor moves to the blank Change Date field; press CLEAR FORM to return to the Case Serial Number fields.

- The fields displaying case header information are provided so that you can verify that you are voiding the correct case. Be sure to check this information before committing the void action to the database.

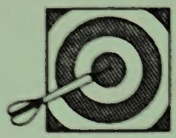
- If you enter a new case serial number before you void a case for which case information has been retrieved, the form asks you if you want to want to commit changes you have made. Although the de-

fault for this question is Y, it does not matter whether you enter a Y or N because the System retrieves and displays case header information for the newly entered case serial number.

- Once case header information is displayed for a case, press EXIT or CLEAR FORM if you do not wish to void the case.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Add Claim Names to Random Serial Numbers Form (CASE159F)



15 minutes

Review the purpose of the Add Claim Names to Random Serial Numbers form.

Purpose and use of the Add Claim Names to Random Serial Numbers Form:

This form allows you to add claim names to up to 13 existing random mining claim cases that do not yet have claim names recorded in the Interim System.

Emphasize that this form only allows the addition of claim names to mining claim cases not yet having claim names.

NOTE:
This form allows you to only add claim names to existing mining claim cases that do not yet have claim names in the System. This form does not allow you to update existing claim names. Use the Update Case Header Form (CASE110F) to update existing claim names in mining claim cases.

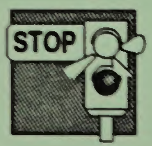
Review who uses this form and why.

BLM personnel responsible for adding claim names to random mining claim cases that do not yet have claim names recorded in the Interim System use this form to perform their task.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE159F program name in QXFER:

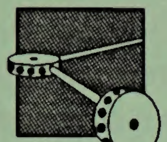
The Add Claim Names to Random Serial Numbers Form (CASE159F) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu and then the Add Claim Names to Random Serial Numbers option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE159F program name.



Discuss data required to use this form.

Required Data you must have to use this form:

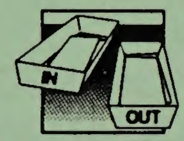
- One or more random mining claim Case Serial Number(s).
- A Claim Name to be added to each of the specified random cases.



Review this form's basic structure and the types of data that can be entered.

Structure of form:

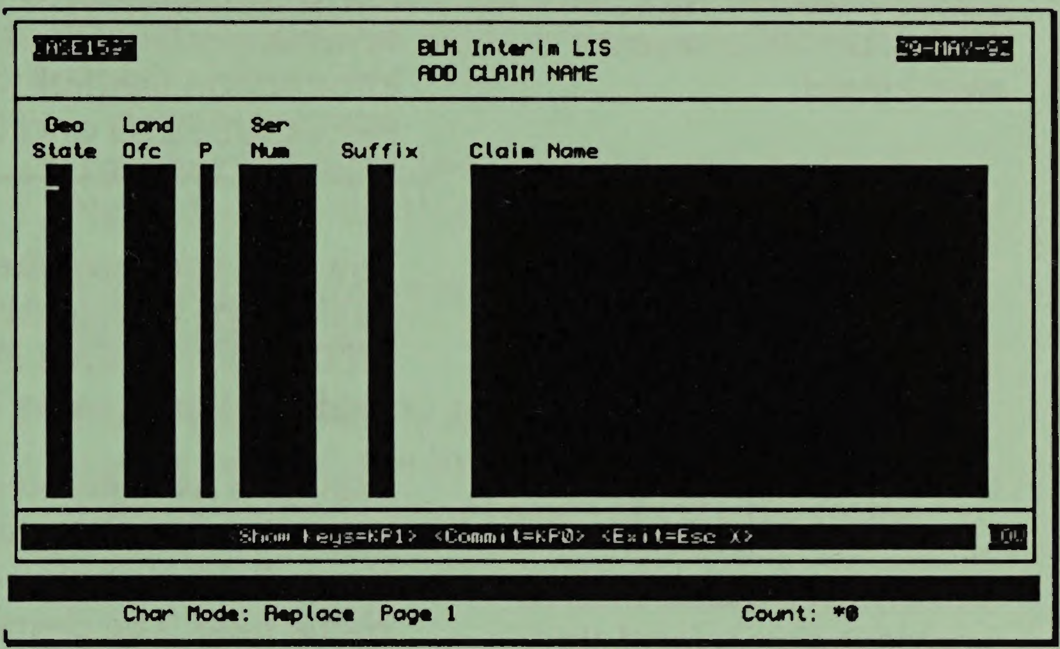
The Add Claim Names to Random Serial Numbers Form consists of one page containing fields for entering up to 13 random case serial numbers and the mining claim names to be added to each of these cases.



Review the step-by-step workflow for the Add Claim Names to Random Serial Numbers form.

Use the available training aids as needed.

Workflow within this form and a review of the form's pages and fields:



STEP 1

This form contains 13 lines, and each line contains fields for entering a random serial number of a mining claim case to which you want a claim name added, and the appropriate claim name.

Emphasize that up to 13 serial numbers and claim names can be specified.

Demonstrate the use of LOV where available.

Enter the case serial number of a valid mining claim case that does not yet have a claim name in the System. Use the Lists of Values (LOV) available in the Geographic State and Land Office fields, if necessary.

Emphasize that only valid, unvoided mining claims cases not yet containing a claim name are accepted on this form. Also mention that a serial number cannot be entered twice on the form.

NOTE:

This form does not allow you to enter claim names for invalid serial numbers, serial numbers of voided cases, serial numbers of non-mining claim cases, or serial numbers of mining claim cases already containing claim names. This form also does not accept serial numbers already entered on the form in the same session (i.e., duplicate serial numbers).

STEP 2 Enter the appropriate claim name. Press NEXT FIELD if you want to move down to the next line on the form and enter another serial number and claim name.

Explain that NEXT/PREVIOUS RECORD, CLEAR RECORD and DELETE RECORD are ***not*** *available and that NEXT/ PREVIOUS FIELD must be used instead.*

NOTE:

The NEXT RECORD, PREVIOUS RECORD, CLEAR RECORD and DELETE RECORD function keys are not available on this form. To return to previously entered fields or lines, use PREVIOUS FIELD. To clear information from all the fields on a line, use PREVIOUS FIELD and CLEAR FIELD repeatedly.

You may not move the cursor beyond the Claim Name field on the thirteenth line of this form; either COMMIT, EXIT, CLEAR FORM, or move back to previous fields and lines using PREVIOUS FIELD.

Mention that COMMIT must be pressed to save entered claim names and that COMMIT is only allowed in the Claim Name field.

After you have entered the serial number(s) and claim name(s) you want added, press COMMIT in the Claim Name field. You may only commit data from the Claim Name field. The claim name(s) you have entered are added to the appropriate mining claim cases, the form clears, and the following message is displayed:

```
Transaction completed - X records pro-
cessed
```

If you press EXIT before committing the claim names entered, the System does not ask if want to commit your additions before exiting the form.

Review the Quirks subsection point by point and briefly summarize the use of this form.

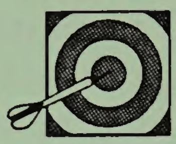
Quirks and special data issues for CASE159F:

- This form allows you to only add claim names to existing mining claim cases that do not yet have claim names in the System. This form does not allow you to update existing claim names. Use the Update Case Header Form (CASE110F) to update existing claim names in mining claim cases.
- This form contains 13 lines, and each line contains fields for entering a random serial number of a mining claim case to which you want a claim name added, as well as the appropriate claim name.

- This form does not allow you to enter claim names for invalid serial numbers, serial numbers of voided cases, serial numbers of non-mining claim cases, or serial numbers of mining claim cases already containing claim names. This form also does not accept serial numbers already entered on the form in the same session.
- The NEXT RECORD, PREVIOUS RECORD, CLEAR RECORD and DELETE RECORD function keys are not available on this form. To return to previously entered fields or lines, use PREVIOUS FIELD.
- You may not move the cursor beyond the Claim Name field on the thirteenth line of this form.
- You may only commit data from the Claim Name field on this form.
- If you press EXIT before committing the claim names entered, the System does not ask if want to commit your additions before exiting the form.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Generate Mining Claims Tape Form (CASE700X)



10 minutes

Review the purpose of the Generate Mining Claims Tape form.

Review who uses this form and why.

Purpose and use of Generate Mining Claims Tape Form:

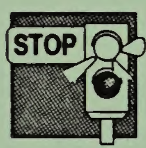
The Generate Mining Claims Tape Form (CASE700X) allows you to specify the information necessary for creating a digital computer tape containing Interim System mining claim case information.

BLM personnel responsible for generating tapes containing digital mining claim data use this form to perform their tasks.

Review navigation to this form (including QXFER).

Navigation to this form and use of CASE700X program name in QXFER:

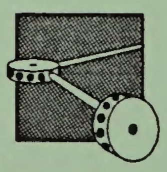
The Generate Mining Claims Tape Form (CASE700X) is an option on the Restricted Case Processing Menu. It is accessed by choosing the Restricted Case Processing Menu option from the Interim System Main Menu, then the Generate Mining Claims Tape option from the Restricted Case Processing Menu. This form can also be accessed from any menu in the Interim System (even a menu or submenu in a different chapter) by using the QXFER field and the CASE700X program name.



Discuss data required to use this form .

Required Data you must have to use this form:

- A sort option choice for the mining claims tape.
- Tape Unit number.
- A decision to output the tape's data in either ASCII or EBCDIC binary code.
- A decision whether or not to create a Prime computer command output (COMO) file containing the data written to the tape.
- A decision to place the tape generation job in the Express queue or the Nite queue on the Prime computer.

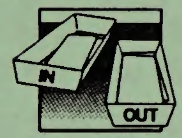


Review this form's basic structure and the types of data that can be entered.

Structure of the form:

The Generate Mining Claims Tape Form consists of a single page containing a menu of sort options for generating the mining claims data tape. The form also contains fields that allow you to choose the computer tape unit (e.g., tape drive) on which to write the tape,

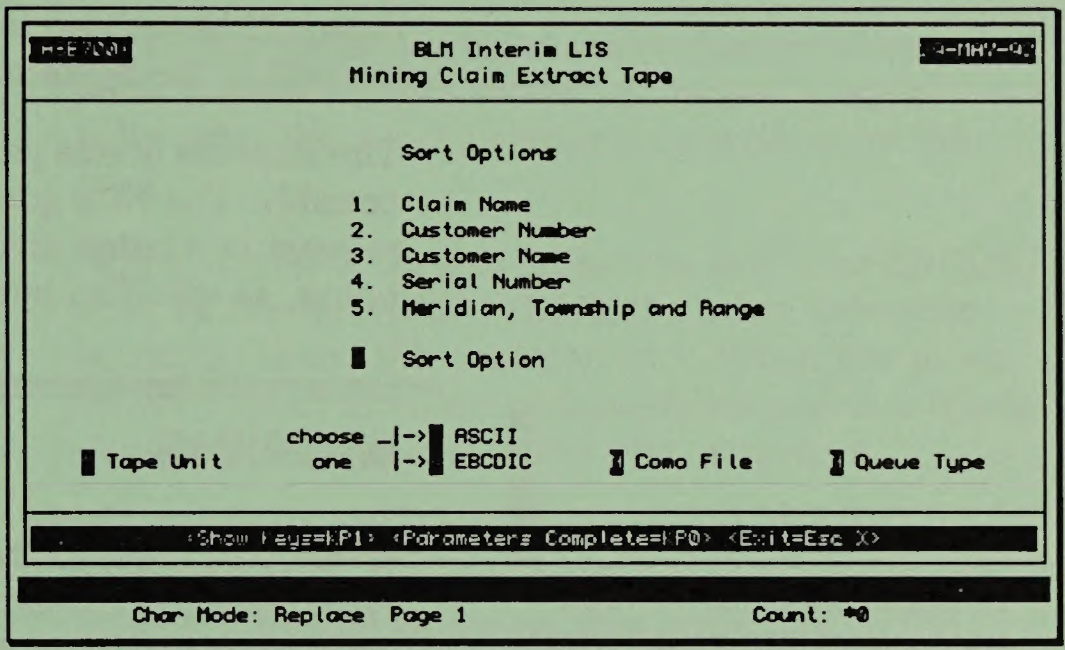
the output binary code of the tape, whether or not you want to create a Prime computer command output (COMO) file containing data written to the tape, and the job queue on the computer in which to place the tape generation request.



Workflow within this form and a review of the form's fields:

Review the step-by-step workflow for the Generate Mining Claims Tape form.

Use the available training aids as needed.



BLM Interim LIS
Mining Claim Extract Tape

Sort Options

1. Claim Name
2. Customer Number
3. Customer Name
4. Serial Number
5. Meridian, Township and Range

Sort Option

choose |-> ASCII
one |-> EBCDIC

Tape Unit Como File Queue Type

<Show Keys=KP1> <Parameters Complete=KP0> <Exit=Esc X>

Char Mode: Replace Page 1 Count: *0

STEP 1

Discuss the available sort options for the tape.

Enter the menu option number that identifies the order of sorting for data written on the mining claims tape. The tape's data can be sorted according to claim names (alphabetical), customer numbers (numerical), customer names (alphabetical), case serial number (numerical) or meridian, township and range (numerical by MTR).

STEP 2

Briefly explain how to choose a tape unit and binary code format.

Enter the tape unit number (`0-9`) of the device or drive where you want to load the tape on which on which mining claims data will be written.

You must decide whether to output the mining claims tape data in ASCII or EBCDIC binary code. Enter an `x` in either the ASCII field or the EBCDIC field. When you enter an `x` in either of these fields and press NEXT FIELD, the other field automatically clears if it contains an `x`. When you press NEXT FIELD in either of these fields and it is blank, the other field automatically fills with an `x`.

Briefly explain what a COMO file is.

Discuss the different queues available.

You must decide whether you want to create a Prime computer command output (COMO) file containing data written to the tape. Enter `Y` to create a COMO file and `N` to not create a file.

The Queue Type field indicates into which of the two available Prime computer job queues the mining claims tape generation job will be placed. The two available queues are the Express queue and the Nite queue, and these determine when the mining claim data will be written to the tape and the priority of this job within the System.

The Express queue generates the tape as soon as possible. The Nite queue places the tape generation request in a batch queue for processing after office hours, as specified by the Database Administrator.

Emphasize that the average user cannot stop a tape generation once it is sent to a queue, especially the Express Queue.

WARNING:

When you press COMMIT with `E` in the Queue Type field, the System generates the mining claims tape immediately through a batch queue. You cannot cancel the tape generation request without logging out the user and batch user on the Prime. To delete a job that is waiting in a queue, contact your Database Administrator or Supervisor to assist in locating the file or batch job and performing a Prime logout or file deletion.

If you send the mining claims tape generation request to the Express queue, you may receive a message similar to the following on your terminal:

```
•••BATCH_SERVICE (user78 on ZEUS) at 15:07

Job CASE700R.101721.CPL for RUREDI
(#10821) completed
```

Discuss and demonstrate the use of REDISPLAY PAGE.

This message indicates that the mining claims tape has been generated (and the COMO file, if requested, has been created). If this message overwrites a portion of an Interim System screen, press REDISPLAY PAGE to restore the original screen image; the appearance of the message does not affect anything you may be doing at your terminal.

If you chose to have COMO file created, check your office procedures for accessing and printing Prime computer COMO files.

Quirks and special data issues for CASE700X:

Review the Quirks subsection point by point and briefly summarize the use of this form.

- This form allows you to specify the information necessary for creating a digital computer tape containing Interim System mining claim case information.

- This form contains a short menu that provides you with five sorting options that allow you to specifically order the mining claims data written on the tape.

- When you enter an **x** in either the ASCII or EBCDIC field and press NEXT FIELD, the other field automatically clears if it contains an **x**. When you press NEXT FIELD in either of these fields and it is blank, the other field automatically fills with an **x**.

- Although you choose a queue type on this form, you do not choose a destination (file or printer) for any output. The mining claims tape is created on the specified tape unit, and, if chosen, a COMO file is created on the Prime computer in your directory.

- When you press COMMIT with **E** in the Queue Type field, the System generates the mining claims tape immediately through a batch queue. You cannot cancel the tape generation request without logging out the user and batch user on the Prime.

Facilitate a group discussion concerning the use of this form. Prompt for and answer questions.

Go to Exercise G-4 *(Void Case, Add Claim Names to Random Serial Numbers and Generate Mining Claims Tape).*

5. Interim System Mass Updates

45 minutes

Review and discuss what Mass Updates are in the Interim System and emphasize that all mass updates are performed by the DBA.

Mention that some mass updates require database validation tables to be updates.

The Interim System Database Administrator in your state has access to several forms that allow them to perform mass updates of information in the System. Mass updates allow you to globally modify data within the Interim System for specific cases, customers, actions, case types, pending entities, etc.... Mass updates of the database typically are performed when an existing case type code, commodity code, action code, customer, etc..., is replaced or when a new code is developed, thus requiring System-wide updates to cases and/or customer data.

Depending on the mass update procedure run, new codes may need to be added to the System's validation tables first so that the System accepts new mass update data.

The following is a list of the available mass update procedures you may request your DBA to perform, and the information you must provide them.

Review each type of mass update that the DBA can perform.

For each mass update, discuss the data and/or data elements updated and the information the DBA must have to perform the mass update. Prompt for and answer questions concerning each type of mass update before moving on to the next section.

Mass Change Pending Entity Codes:

You may request the DBA to mass change BLM and other pending entity codes, table-wide for all appropriate action records within the System's action table. Changes made effect pending entity code values wherever they occur within the action records of all cases in the System. You must provide the DBA with an old BLM Pending Entity code to be replaced and/or an old Other Pending Entity code for non-BLM entities. For each old code, you must provide the DBA with a new, replacement BLM and/or Other Pending Entity code.

Mass Change Commodity Codes:

You may request the DBA to mass change commodity codes, table-wide within the System's units/commodity table; this table is related directly to the System's action table. Changes made effect the specified commodity code values wherever they occur within the System's units/commodity records. You must provide the DBA with an old commodity code to be replaced and a new replacement code. While an old commodity code can be changed to a new one wherever it occurs in the entire System, you can have the DBA limit the

update to a specific case type and/or a range of case serial numbers. To limit the update in this way, you must give the DBA the case type and/or the range of serial numbers, in addition to the old and new commodity code.

Mass Change Case Type Codes:

You may request the DBA to mass change case type codes, table-wide within the System's case table. Changes made effect the specified case type values wherever they occur within the System's case records. You must provide the DBA with an old case type code to be replaced and a new replacement code. While an old case type code can be changed to a new one wherever it occurs in the entire System, you can have the DBA limit the update to a range of case serial numbers. To limit the update in this way, you must give the DBA the range of serial numbers, in addition to the old and new case type code.

Mass Change Customer/Action for Bankruptcy:

You may request the DBA to mass add a BANKRUPTCY action record (code **066**), table-wide within the System's action table, to all of a customer's case(s) when that customer files for bankruptcy. The You must provide the DBA with the customer's ID number, name number and address number, as well as the action date, employee initials and office code of the bankruptcy action record to be added to the customer's case(s). You may specify action remarks for the DBA to include with the BANKRUPTCY action records, but this is optional. While a bankruptcy action record can be added to all of a customer's cases, you can have the DBA limit the addition of this action to cases having a specified case status. To limit the addition of bankruptcy action records in this way, you must give the DBA the status code(s); up to six status codes can be specified.

Mass Change Customer/Action for Corporate Merger:

You may request the DBA to mass add a MERGER RECOGNIZED action record (code **280**) to a corporation customer's case(s) when the BLM officially recognizes that the corporation has merged with another corporation. For all cases affected by the mass addition of this action record, the DBA automatically mass

changes the old (i.e., merged) corporation's customer ID, name number and address number to those of the new corporation. You must provide the DBA with the old and new corporations' customer ID numbers, name numbers and address numbers, as well as the action date, employee initials and office code of the merger recognized action record to be added to the old corporation's case(s). You may specify action remarks for the DBA to include with the merger recognized action records, but this is optional. While a merger recognized action record can be added to all of a corporation's cases, you can have the DBA limit the addition of this action to cases having a specified case status. To limit the addition of merger recognized action records in this way, you must give the DBA the status code(s); up to six status codes can be specified.

Mass Change Customer/Action for Name Change:

You may request the DBA to mass add a NAME CHANGE RECOGNIZED action record (code **290**) to a customer's case(s) when the BLM officially recognizes that the customer's name has changed. For all cases affected by the mass addition of this action record, the DBA automatically mass changes the old customer ID, name number and address number to those of the new customer; for some name changes, old and new customer data remain unchanged. You must provide the DBA with the old and new customer ID numbers, name numbers and address numbers, as well as the action date, employee initials and office code of the name change recognized action record to be added to the old customer's case(s). You may specify action remarks for the DBA to include with the name change recognized action records, but this is optional. While a name change recognized action record can be added to all of a customer's cases, you can have the DBA limit the addition of this action to cases having a specified case status. To limit the addition of name change recognized action records in this way, you must give the DBA the status code(s); up to six status codes can be specified.

Mass Change Action Codes:

You may request the DBA to mass change an action code, table-wide within the System's action table. Changes made effect the specified action code values wherever they occur within the System's action

records. You must provide the DBA with an old action code to be replaced and a new replacement code. In all action records affected by a mass action code change throughout the System, you optionally may have the DBA mass change existing (i.e., old) action remarks, employee initials and/or office code with new ones. To mass change these existing data, you must give the DBA the replacement action remarks, employee initials and/or office code.

Mass Change of FRC Location Code:

You can request the DBA to mass change an FRC location code, table-wide within the System's case table. Changes made effect the specified FRC location code value wherever it occurs within the System's case records. You must provide the DBA with the old FRC location code to be replaced and a new replacement code. While an old FRC location code can be changed to a new one wherever it occurs in the entire System, you optionally can have the DBA limit the change to specific accession numbers and box numbers. To limit the change in this way, you must give the DBA the accession number/box number combinations.

Mass Change FRC Accession Numbers:

You can request the DBA to mass change an FRC accession number, table-wide within the System's case table. Changes made effect the specified FRC accession number wherever it occurs within the System's case records. You must provide the DBA with the old FRC accession number to be replaced and a new replacement number. While an old FRC accession number can be changed to a new one wherever it occurs in the entire System, you optionally can have the DBA limit the change to specific box numbers. To limit the change in this way, you must give the DBA the box numbers.

Mass Change of FRC Site Code:

You can request the DBA to mass change an FRC site code, table-wide within the System's case table. Changes made effect the specified FRC site code wherever it occurs within the System's case records. You must provide the DBA with the old FRC site code to be replaced and a new replacement code. While an old FRC site code can be changed to a new one wherever it occurs in the entire System, you optionally can

have the DBA limit the change to specific accession numbers and box numbers. To limit the change in this way, you must give the DBA the accession number/box number combinations.

Mass Change of FRC Box Number:

You can request the DBA to mass change an FRC box number, table-wide within the System's case table. Changes made effect the specified FRC box number wherever it occurs within the System's case records. You must provide the DBA with the new, replacement FRC box number and up to five old box numbers to be replaced. While a new FRC box number can replace up to five old box numbers wherever they occur in the entire System, you optionally can have the DBA limit the change to specific accession numbers. To limit the change in this way, you must give the DBA the accession number.

Mass Change of FRC Disposal Date:

You can request the DBA to mass change an FRC disposal date, table-wide within the System's case table. Changes made effect the specified FRC disposal date wherever it occurs within the System's case records. You must provide the DBA with the old FRC disposal date to be replaced and a new disposal date. While an old FRC disposal date can be changed to a new one wherever it occurs in the entire System, you optionally can have the DBA limit the change to specific accession numbers and box numbers. To limit the change in this way, you must give the DBA the accession number/box number combinations.

Mass Add Actions by Case Type:

You may request the DBA to mass add an action record(s) to all the cases within a single case type or mask. You must provide the DBA with either a single case type code or mask code, as well as the action code and action date of the record to be added to the specified cases. You may optionally provide the DBA with action remarks, employee initials and/or an office for the action record to be mass added. While an action record can be mass added to all of the cases within a specified case type or mask, you can have the DBA limit the mass addition to cases having a specific case

status. To limit the addition of action records in this way, you must give the DBA the status code(s); up to six status codes can be specified.

Mass Delete Actions:

You may request the DBA to mass delete an action record(s) from all the cases within a single case type or mask. You must provide the DBA with the action code and action date of the record to be deleted, along with either a single case type code or mask code. All action records within the specified case type or mask having the specified action code and date will be mass deleted.

Mass Transfer Cases Between Customers:

You may request the DBA to mass transfer one customer's cases to another customer within the entire System. You must provide the DBA with an old customer ID, name number and address number (i.e., those to be replaced) and a new, replacement customer ID, name number and address number. In all of the old customer's cases, that customer is replaced by the new customer. While a customer mass transfer can affect all of the old customer's cases, you can have the DBA limit the mass transfer to cases having a specific case status. To limit the transfer of the customer in this way, you must give the DBA the status code(s); up to six status codes can be specified.

30 minutes
(Course Review and Summary, Questions, Close-Out and Evaluations.)

Briefly review and summarize the material covered in the Restricted Case Processing Course.

Prompt for and answer questions.

Close-out with the class and have each participant fill out an Evaluation Form.

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